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Ira Bogotch
Carolyn M. Shields *Editors*

International Handbook of Educational Leadership and Social (In)Justice

Volume 1

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Editors

International Handbook of Educational Leadership and Social (In)Justice

Volume 1

Springer

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Co-Editors

Ira Bogotch is a professor of educational leadership at Florida Atlantic University. He has a master's degree in teaching English as a second language (Teachers College, Columbia University) and has taught in New York City, Guatemala City, and Washington, D.C. He also has a master's degree in philosophy (The New School) and an educational leadership doctorate (Florida International University). In the 1990s, Ira facilitated the development of leadership standards in the state of Louisiana. He is the Associate Editor of the *International Journal of Leadership in Education*. He has been writing on the topic of leadership for social justice for over 10 years beginning with a 2002 article titled "Educational leadership and social justice: Practice into Theory" published in the *Journal of School Leadership*. He also co-authored *Radicalizing Educational Leadership*: *Dimensions of Social Justice.* Recently, he has taken his social justice platform titled "social justice as an educational construct" to Malaysia, Scotland, England, and Australia. Ira believes that this Handbook goes beyond rhetorical support for social justice and its publication must be a continuing step in the worldwide struggles to recenter education around the concepts, methods and actions for social change and justice.

Dr. Carolyn M. Shields is professor and dean of the College of Education at Wayne State University, Detroit, Michigan. Previously she was a professor of leadership in the Department of Educational Organization and Leadership at the University of Illinois at Urbana Champaign and the University of British Columbia. She is past president of the Canadian Association for Studies in Educational Administration, and former Canadian representative to the Board of the Commonwealth Council for Educational Administration and Management. Her teaching is in the area of transformative leadership, deep democracy, equitable policy, social justice, and research methodology. Her research focuses on how educational leaders can create learning environments that are deeply democratic, socially just, inclusive of all students' lived experiences, and that prepare students for excellence and citizenship in our global society. These interests are reflected in her presentations and publications—over 100 articles, numerous chapters, hundreds of conference and keynote presentations, and nine books—the most recent of which is *Transformative Leadership in Education: Equitable Change in an Uncertain and Complex World*, published by Routledge. She has received recognition for both her teaching and her career contributions to the field of educational leadership.

Acknowledgements

From the beginning, our intent was to promote new socially conscious educational ideas and practices from around the world. That objective in itself is not original. The idea that educators ought to be involved in the lives of adults and children not just in terms of teaching basic reading and mathematical skills has been central to establishing free, yet compulsory public school systems around the world. Too often, in too many places, educational services have to compete for funding and support with other economic, social, and political institutions. And too often, educational inequities persist—inequities in teacher quality, in access for male and female students, in opportunities for those from certain ethnic or cultural groups. Often these educational inequities reflect larger historical, social, cultural, economic, and political divisions within societies. For us, because of a firm belief that education offers a way forward, that it provides opportunities for individual and collective development and for the enhancement of civil society, each of these disparities requires an educational response and presents a challenge to educational leaders everywhere.

With this *International Handbook on Educational Leadership and Social (In) Justice*, we wanted to integrate the growing literature bases on social justice across teaching, learning, and leadership, before the ideas hardened into fixed disciplinary categories as so many other generative ideas have done in the multiple fields of education. While we recognize a place for professional identities based on specialization, we believe, with others, that the primary identity should be that of educator and only secondarily to the subfields of special education, counselor education, health education, administration, etc. If the concept of social justice means anything substantively, it must transcend the petty divides created by specializations in education and become foundational to the work of all educators.

The significance of an International Handbook is that it has the potential to disrupt the dominance of English and primacy of Western ideas as if they communicate adequately and explain the whole of human educational experiences. It is here that we hope future readers/authors will carry forward, challenge, reflect on, and extend, the ideas presented here. We are grateful to the educational researchers, advocates, and activists who see economic, political, and cultural possibilities for societal change in education around the world. This handbook, therefore, is not an historical recording of reviews of literature, but rather a forward looking call for more research, more advocacy, and more activism among all educators. We hope that even those who chose not to join us in this handbook but who clearly share our broader concerns for public education will continue to speak out and make their voices heard in the quest for more equitable education for all.

Together, we (Ira and Carolyn) want to acknowledge the trust extended to us by Yoka Janssen, Publishing Editor of Springer Publishers. She quickly grasped the fact that although this work is part of the long tradition of Springer International Handbooks, the topic of social justice is still in its infancy and that such a handbook is worthwhile even in communities and nations where the term social justice may be forbidden or put its author in danger. This publication is also about justification and legitimacy of new ideas and new educational research methods. If social justice communicates new visions, then it requires new methods of presentation and study as well.

We also want to acknowledge the participation of all of the authors who contributed to this handbook. It is rare that such a large collection of authors is so committed to revising their work, meeting timelines, and answering the editors' many queries. We appreciate the dedication that shines through each chapter, indicating that these are not simply additional chapters for the authors' vitae but contributions that embody a singular belief in the need for, and power of, leadership for social justice. To each of you, we offer our thanks. We also acknowledge the editorial support provided us by Dr. Erica Mohan, a former doctoral student of Carolyn's.

Ira would first like to thank co-editor Carolyn Shields who as a researcher and colleague has exemplified the values and practices of social justice. The two of us have been part of a small community among educational leaders that has been supported by the American Educational Research Association Special Interest Group, Leadership for Social Justice, and its founding Chair, Professor Catherine Marshall. Ira also wants to thank four individuals who held extensive conversations on social justice, Floyd Beachum, Jackie Blount, Jeffery Brooks and Fenwick English. These conversations culminated in the co-authored text, *Radicalizing Educational Leadership: Dimensions of Social Justice* (Sense Publishers, 2007). My (Ira) own development as a critical scholar has been advanced by engaging and reading the works of Luis Miron, Spencer Maxcy, William Foster, Gert Biesta, Gary Anderson, and more recently Catherine Lugg, Autumn Tooms, Dilys Schoorman, and Christa Boske. At home, I am surrounded by a diverse group of educators. My wife, a physician-educator dispenses life lessons as well as medical advice. Her pre-medical school background as a 6th grade teacher in Brooklyn and an English as a Second Language instructor in Puerto Rico is what inspired me to become an educator. She still inspires me to become a better person. My daughter, lead science educator at a local science museum, is the master teacher in the family interacting comfortably with children of all ages who walk through the museum's doors. My son, recently accepted into Teach For America, lives social justice every day of his life in his approach to finding solutions and his leadership. He has already changed many lives for the better.

Carolyn likewise wants to begin by acknowledging the inspiration of co-editor Ira Bogotch whose enthusiasm, commitment, and insights have made this handbook a reality. He is the real force behind the work in addition to being a wonderful scholar and friend. Carolyn could not begin to identify the scholarly influences on her work, except to say that they represent many disciplines and cross boundaries of time and place (Buber, Bakhtin, Delpit, Foster, Wheatley, and so on). I (Carolyn) have also learned much from all of my students over the years, so many of them dedicated practitioners whose daily work has inspired my thinking. Specifically, I want to acknowledge the students and colleagues with whom I have written and published in the past—Erica, Mark, Anish, Ann, John, Andre, Russell, and many others. This handbook, and my own growth, owe much to all of you. To my son Martin, whose diplomatic career has not only taken him around the world, but provided me opportunities to learn from his involvement, insights, and colleagues and to experience new places, I owe a debt of gratitude. Similarly, my own education has been enhanced by my son Geoff and his extended family that always includes exchange students from many parts of the world; to them I am also grateful.

Most particularly, Ira and Carolyn want to thank those educational leaders (not simply those who hold formal roles) who work on a daily basis to promote the ideas found in the pages of this handbook. For their advocacy, activism, and dedication in the face of ongoing challenges—sometimes even at risk of their careers or worse—we cannot say a strong enough “Thank You.” Our gratitude to all of you, although inadequately expressed, is heartfelt and profound.

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Karyn Cooper is a Professor in the department of Curriculum, Teaching and Learning, University of Toronto. For the past 12 years, Karyn's research, teaching, and writing have been in the areas of literacy education, curriculum studies, teacher education, interpretive and critical approaches to research, and the study of digital technology for a democratic curriculum. At the heart of her work is the belief that looking critically at a variety of personal and ethical issues may support and enhance inclusion, equity and democratic practice. Some of her books include *Qualitative Research in the Postmodern Era: Contexts of Qualitative Research. Volume I.* Springer 2012), *Critical Literacies in Action: Social Perspectives and Teaching Practice.* Volume 34 in S. Steinberg and J. Kincheloe (Series Editors) *Transgressions: Cultural Studies and Education.* (Sense Publishers 2008) and *Burning Issues: Foundations of Education* (ScarecrowEducation 2004). Her current research gathered in a two-volume set of texts features video interviews with many of the giants in the field of qualitative research and/or critical perspectives across the social sciences and humanities. Zygmunt Bauman, Noam Chomsky, Helene Cixous, Clifford Geertz, and Maxine Greene are but a few who share their perspectives providing an opportunity to compress the history of qualitative and critical research paradigm development into a rich overview. Through the development of a website select video clips from these texts may be viewed at <cooperwhite.com>. Future website work involves developing *the digital scholar network* to further a global dialogue on qualitative research across the social sciences and humanities.

Maha Damaj has been working in community development and rights issues for the past 15 years, specifically in the areas of child protection, non-discrimination, the involvement of children and youth in decision making, and disability and inclusion. The latter was the subject of her doctoral research, which inspired this chapter. She has worked in academia as well as with local, regional, and international NGOs and UN agencies where she was involved in strategic planning, policy development, the development and management of programs, as well as research and evaluation, technical training, and the development of manuals and resources. Based primarily in Lebanon, her experience spans several countries in the Middle East region, as well as a year in South-East Asia managing post-emergency programs with UNICEF.

Neil Dempster, a foundation member of the Griffith Institute for Educational Research (GIER), is an Adjunct Professor of Griffith University and has been a member of staff for more than 20 years. He works internationally in the field of educational leadership particularly in leadership for learning, school governance and the role of professional development in leadership, policy implementation and institutional change. His scholarship is evident in publications and grant success, his academic leadership externally and within the university. His research publication record includes a number of books and many book chapters and refereed journal articles. Professor Dempster has served Griffith as Head of School, Dean of Education and Research Centre Director. He has taught a wide variety of courses in Education with many post-graduate supervisions in educational leadership. Since 2000, he has supervised 34 doctoral research students to completion. He continues to serve the external educational community through invitations to conduct professional learning for school leaders and teachers.

José Antonio Ramírez Díaz is a psychologist certified by the Western Institute of Technology and Higher Education (ITESO) and received his Master in Organizational Development from ITESO and Ph.D. in Education from the University of Guadalajara. He was the Head of the Department of Welfare and Sustainable Development, University of Guadalajara (CUNorte) (2005–2008) and Professor of the Department of Education, University of Guadalajara (CUCSH), Professor Promep Profile (2007–2010 and 2010–2013) by the Ministry of Education. He is also Member I of the National Research System of CONACYT and Member of the Mexican Council of Educational Research (COMIE). His areas of research include: Educational policies, international and institutional changes. In the Iberoa-merican Network of Educational Policies Research (RIAIPE) he is the Coordinator for University of Guadalajara. He is the author of the books: "La universidad ante la globalización" (Deauno, Argentina, 2008) and "Equidad en la educación superior en México" (Deauno, Argentina, 2012). He is also a speaker and panelist in Buenos Aires, Santiago de Chile, Barcelona, Brazil, Cuba, San Jose Costa Rica and Mexico.

Arnold Dodge, Ph.D., is chairperson of the Department of Educational Leadership and Administration at LIU-Post. He retired from the public schools in August 2007 after serving as superintendent, curriculum administrator, principal and teacher. In his 43rd year in education, Dr. Dodge's research interests focus on the impact of high-stakes testing on teachers and students and issues of race, poverty and schooling. With a colleague from Yale University, he collaborated on a large scale study regarding the social/emotional consequences of high stakes testing, focusing on teacher stress factors. He travels each fall to South Africa to continue work on an investigation into the effects of race and poverty on schooling in both South Africa and the USA. A joint venture of Stellenbosch University, near Cape Town South Africa, and Long Island University, this project has expanded to include virtual communities between educators and students in both countries. Dr. Dodge has moderated and participated in symposia on international schooling, most recently regarding his visits to schools in China and Finland. His published work centers on the relationship between public policy and constructed discourse.

Robert Donmoyer is currently Professor of Leadership Studies at the University of San Diego. Prior to moving to the University of San Diego, Dr. Donmoyer worked for 20 years as a Professor at the Ohio State University. During his final years at Ohio State, Dr. Donmoyer served as Director of the School of Educational Policy and Leadership. Dr. Donmoyer's publications have focused on educational leadership and leadership education, educational reform, research methodology, and research utilization issues. One research utilization issue that Dr. Donmoyer has written about is the potential for ostensibly empirical research to reinforce inequality through the framing of research topics and questions, a process that predates and often impacts in significant ways the empirical components of a study. A recent paper for the Annual Meeting of the American Educational Research Association, which was co-authored with first nations scholar Pat Makokis and Dr. Donmoyer's former doctoral student, Julia Buchanan, adapted the Cree nation's talking circle procedure to explore, through a multiple perspectives dialogue, the problems with and the possibilities of non-indigenous people studying indigenous groups. The study was grounded in Dr. Buchanan's attempts to do her dissertation research on indigenous views of leadership on the Saddle Lake Reserve in Canada where Dr. Makokis lives and works. Dr. Donmoyer chaired the dissertation.

Karen Dooley is an Associate Professor in the Faculty of Education, Queensland University of Technology. She teaches in primary English. She is interested in literacy education for young people in linguistically and culturally diverse schools and in after school clubs and programs.

Charles Dukes is Associate Professor and doctoral coordinator in the Department of Exceptional Student Education at Florida Atlantic University where he teaches courses in general special education, disability studies, and applied behavior analysis. Dr. Dukes is an active member of the Council for Exceptional Children and TASH. He is the current editor of the TASH publication, *TASH Connections*, a professional magazine published by TASH for researchers, practitioners, families, and self-advocates interested in issues related to persons with severe disabilities. He believes that social justice permeates virtually every aspect of the education process, as all humans regardless of ability deserve the right to exert personal choice and take part in all parts in life. Dr. Dukes' research interests include linking multicultural and special education, social and intimate relationships for persons with severe disabilities, concept maps as a research and assessment tool, and educational supports for persons with severe disabilities.

Lisa Catherine Ehrich is an Associate Professor in the School of Learning and Professional Studies, Faculty of Education, at Queensland University of Technology (QUT), Australia. She has 20 years' experience working in higher education and 2.5 years' teaching experience in secondary schools in Queensland. She is the Area of Interest Co-ordinator for Leadership and Management in the Masters of Education degree program and, for many years, worked as a member of a teaching team responsible for the Doctor of Education program. She has considerable international teaching experience and has taught school leaders and administrators in countries such as Papua New Guinea, Singapore, the Philippines and China. At QUT, she has coordinated and taught short programs on leadership development for higher education students, school teachers and leaders, and university academics from many countries in South East Asia. While her research areas are eclectic since she has published in fields as diverse as phenomenology, mentoring, affirmative action for women, and micropolitics, her substantive research area is leadership. With Neil Cranston, she has written two books on leadership: *What Is This Thing Called Leadership?: Prominent Australians Tell Their Stories* and *Australian School*

Leadership Today (both published by Australian Academic Press). In 2012, with academics from QUT and the University of Manchester, she was awarded an Australian Research Council Linkage Grant to explore ethical leadership in a time of evidence-based reform.

Heyam Loutfi El Zein has a doctorate in Educational Management from the University of Leicester–England, Master of Arts in Educational Psychology, Graduate Diploma in Youth and ECE from the University of Victoria–Canada, and Bachelor of Arts in Psychology from American University–Beirut. She is an Associate Professor in Educational Management at Rafic Hariri University. Dr. Loutfi has conducted numerous teacher training workshops on ECE, Peace Education and Children's Rights, Conflict Transformation, and Teacher's Empowerment in Lebanon and across the region. She has published in international journals and presented papers in regional and international conferences.

Fenwick W. English is the R. Wendell Eaves Senior Distinguished Professor of Educational Leadership in the School of Education at the University of North Carolina at Chapel Hill. He is the author or co-author of 35 books including *Educational Administration: The Human Science* (1992); *Theory in Educational Administration* (1994); *The Art of Educational Leadership* (2008); *Anatomy of Professional Practice* (2008); *Restoring Human Agency to Educational Administration* (2010) and *Turnaround Principals for Underperforming Schools* (2011) with Rosemary Papa. He has presented his work over two decades at the American Educational Research Association Divisions A and L; National Council of Professors of Educational Administration; University Council of Educational Administration; British Educational Leadership and Management Society; and the Commonwealth Council for Educational Administration. He was the editor of *The Encyclopedia of Educational Leadership and Administration* (2006) two volumes for Sage; the editor of a four-volume series *Library of Educational Thought and Practice: Educational Leadership and Administration* (2009) for Sage; and the editor of *The Second Handbook of Educational Leadership* (2011) for Sage. He was the President of NCPEA (2011–2012) and of UCEA (2006–2007) respectively. As an educational practitioner he has held the positions of middle school principal (California); assistant superintendent of schools (Florida); superintendent of schools (New York); associate executive director of the AASA (Virginia); National Practice Director of Elementary and Secondary Education for Peat, Marwick, Mitchell & Co. (Washington, D.C.); Department Chair-University of Cincinnati (Ohio); Dean, School of Education at Indiana University-Purdue University in Fort Wayne and later Vice-Chancellor of Academic Affairs.

Beryl Exley is a Senior Lecturer in the Faculty of Education, Queensland University of Technology. She teaches in English and literacy and educational sociology. Her research relates to literacy across the curriculum, school reform and teacher knowledge.

Susan B. Feldman is an Assistant Professor, Lewis and Clark Graduate School for Educational Leadership and School Counseling, in Portland Oregon and the Director of the Research Center for Learning and Leadership at Education Service District 112, in Vancouver, Washington, where she works on pressing and persistent problems of practice with school leaders. Sue is a mixed methods researcher. Sue combines her background in cognitive psychology and education leadership and policy to form an interdisciplinary research agenda focused on leadership and policy conditions for equity policies. She is a recent Ph.D. graduate from the University of Washington, Education Leadership and Policy Studies program. Her dissertation, "Inquiry-focused reform: How teachers learn new practices from their current practice," was completed in 2010. Sue's work on injustice in education began in her K-5 classrooms where she practiced critical pedagogy as a classroom teacher. As a faculty member at the Evergreen State College Master in Teaching program and as Academic Director of Teacher Education at Pacific Oaks College Northwest, Sue continued to work on designing pre-service experiences to prepare new teachers to work for social justice in their classrooms. Working currently with school and school district leaders Sue continues to focus on the complex pressing and persistent injustices in education.

Jesús Ruiz Flores, Ph.D. in Education, specialized in Education and Labor. He is a Psychologist and Master in Higher Education Planification and Professor of University of Guadalajara (México) at the Department of Politics and Society. He is also a Member of the Research Group "Education, Public Policy and Regional Development" and Researcher of the networks "Poverty and Urban Development" and "Cooperation and Development Ibero American Centers". He is a Coordinator at the Western Social Science Association of the Latin American Section (USA) and Observatorio Ciudadano de la Educación-Jalisco Chapter (México), Seminar on educational processes and labor markets (México). He is author of the book "Educación, formación profesional y mercados de trabajo" (UNAM, UdeG, IMCED, México, 2008), and has coauthored with Rogelio Raya and Rosalía López "Procesos formativos y estructuración de mercados de trabajo" (Universidad de Guadalajara, México, 2010) and "Región y globalización. Articulaciones sociales de los mercados laborales" (Editorial Académica Española, España, 2012). He makes research visits to: University of Guanajuato (México), Autonomous University of Aguascalientes (México), Autonomous University of Barcelona, and Complutense University of Madrid.

Christine Forde is a Professor of Leadership and Professional Learning in the School of Education at the University of Glasgow, UK. In the leadership preparation programs she has developed, leadership is constructed as a values-based practice where leaders need to both articulate and appraise their practice in terms of equality, social justice and fairness for all learners. This work in leadership development, equality and social justice draws from her interest in feminist theory and the possibilities offered by feminist scholarship in reconceptualizing the concept of gender with educational policy and practice. She has published books and articles in the area of gender and feminist perspectives in education including *Feminist Utopianism and Education* (Sense, 2008). One of her current areas of research is an exploration of ideologies of gender and the feminization of the teaching profession, particularly the construction of “teacher as mother” in educational theory. A critical issue for her is the relationship between theoretical explorations of gender, the discourses of femininity and masculinity and the achievement of pupils (*Tackling Gender Inequality: Raising Pupil Achievement*, Dunedin 2008).

Bronwyn Fredericks is a Murri Australian woman from South-east Queensland (Ipswich/Brisbane region), Australia. She is a Professor and the Pro Vice-Chancellor (Indigenous Engagement) and the BMA Chair in Indigenous Engagement at CQUniversity Australia. In 2012, she became CQUniversity’s President of Academic Board, and in doing so became the first Aboriginal Australian to hold such a role in an Australian university. Bronwyn is an Alumnus of CQUniversity Australia, Queensland University of Technology and the University of Tasmania. She was awarded her Ph.D. in 2004 and has since been awarded a National Health and Medical Research Council Post-Doctoral Fellowship at Monash University and an Australian Endeavour Award, which saw her spend time with the University of Auckland and Te Whare Wananga o Awanuiarangi, Whakatane, New Zealand. Becoming a secondary home economics and history teacher in the 1980s, Bronwyn was last in a school classroom in 2007. She is often invited to school awards nights, and to spend time with school and university students in a range of settings. Bronwyn is committed to equity at all levels: from increasing Indigenous access to supporting Indigenous participation across the success continuum. She attempts to motivate all people to utilize education and training as a tool and a vehicle to “be what they want to be!”

Joaquín Gairin is a Professor of Teaching and Educational Administration, Director of the Organisational Development Research Group (EDO) and international advisor. He is former Director of Educational Sciences Institute, former Dean of the Faculty of Education and, currently, Director of the Applied Pedagogy Department at the Universitat Autònoma de Barcelona. Recently, he has finished two projects for promoting educational management and leadership in Latin America, funded by Spanish Agency for International Development Cooperation. He is currently leading a project for widening access to higher education for underrepresented groups as well as for nontraditional learners in Latin America. His research interest includes educational administration and leadership, knowledge management, organizational development and professional development.

Mary E. Gardiner/Henry, Ph.D., an immigrant to the USA from Australia, is currently a Professor of Educational Leadership, University of Idaho, Boise. She is interested in the social and cultural dimensions of learning and leadership, social justice leadership, and leadership praxis for democracy. She co-authored a chapter in the book *Social Justice Leadership for a Global World* (2012), a chapter in the book *Breaking Into the All-Male Club* (2009, SUNY Press); and has authored books *Latino Dropouts in Rural America* (2008, SUNY Press), *Coloring Outside the Lines*: *Mentoring Women into Educational Leadership* (2000, SUNY) and articles.

Gretchen Givens Generett, Ph.D. has spent the last 15 years in academia researching and teaching on issues of teacher professional development, educational leadership, and cultural diversity. Currently the Associate Dean for Graduate Studies and Research at Duquesne University, Dr. Generett is also the Co-director of the University Council for Educational Administration Center for Educational Leadership and Social Justice. Her teaching and research are designed to enhance the skills and habits of mind necessary for educators to effectively teach students from diverse populations. Dr. Generett's has published extensively in peer-reviewed journals and edited volumes in the field of education. She is the co-editor of the book *Black Women in the Field: Experiences Understanding Ourselves and Others through Qualitative Research* published by Hampton Press and has served as the guest editor for the journals *Educational Foundations*, *Educational Studies*, and *Journal of Cases in Educational Leadership.* Dr. Generett earned undergraduate degree at Spelman College and her doctorate at the University of North Carolina at Chapel Hill.

Louise Gonsalvez. As a scholar activist I am always seeking systemic injustices to identify, critically reflect upon, analyze, confront and overcome. This picture was taken at Machu Picchu, in Peru, after I completed two research/capacity building projects in Ecuador. One project took place in the coastal mangrove wetlands and the other on the Galapagos Islands. As I stand betwixt a sacred Inca gateway, atop Andean peaks, upon a world famous UNESCO World Heritage Site, I feel transformed by my recent experiences in Ecuador and restored by this sacred site. I am prepared to carry on my social justice research and work in that fused metaphysical place I call the praxis lands.

Carolyn Grant is a Senior Lecturer in Education Leadership and Management in the Faculty of Education at Rhodes University, Grahamstown, South Africa. She teaches on the Honours, master's and Ph.D. programs in Education Leadership and Management and is also involved in the research design courses. Her research interests span both the schooling sector and the terrain of higher education. Her research in the schooling sector includes teacher leadership as one manifestation of a distributed perspective on leadership, leadership for social justice as well as school resilience. More recently, she has concentrated on her own teaching, research and supervision in the Higher Education sector and has begun to theorize in the areas of teaching, learning and assessment at the master's and doctoral levels.

Ivan Greenberg. My interest in the work and political cultures of adult learners derives from several years of teaching American labor history to electrical apprentices from Local 3 of the International Brotherhood of Electrical Workers (IBEW) in New York City. I taught in a partnership program run by Empire State College, SUNY, and discovered that adult students expressed greatest educational interest when the subject matter was connected to their everyday lives. They proved eager to learn the history of strikes, worker control movements, as well as labor culture. The introduction of complex ideas succeeded when made "relevant" to contemporary concerns. My background was suited to such engagement. I wrote my doctoral dissertation in labor and social history at the CUNY Graduate Center, published several articles on education and workers, and participated as an activist on the margins of several social justice movements. Recently, I keenly am interested in the treatment of political dissidents in American society and published two books – *The Dangers of Dissent* (2010) and *Surveillance in America* (2012) – on the history of social movements, civil liberties, and state surveillance.

Morwenna Griffiths is the Chair of Classroom Learning in the Moray House School of Education at Edinburgh University. She has taught in primary schools in Bristol, and at the University of Isfahan, Iran, at Christ Church College HE in Canterbury, and at Oxford Brookes, Nottingham and Nottingham Trent Universities. Her recent research has included philosophical theorizing and empirical investigation, related to social justice, influencing policy makers through theory, epistemology of auto/biography, public spaces, the nature of practice, feminization and creativity. Her books include *Action for Social Justice in Education: Fairly Different*; *Educational Research for Social Justice,* and *Feminisms and the Self;* and *the Web of Identity*. She takes the view that social justice is best understood as dynamic, and further that any specific formulation is always revisable. Her current research is focused on two main philosophical concerns. The first concern is the development of an understanding of pedagogical relations viewed as embodied, context-dependent and temporal. Such an understanding will have implications for what it is to be a socially just leader and teacher. The second concern focuses on extending social justice concerns beyond human relations: on how to act justly in a world which is constituted of the more-than-human as well as the human.

Christina Hajisoteriou received her M.Phil. in Educational Research from the University of Cambridge, UK. She was also awarded the Degree of the Doctor of Philosophy by the University of Cambridge, UK. Her research interests relate to intercultural education, migration, Europeanization, identity politics and social justice.

Edward L. Harris is Professor and Williams Chair of Educational Leadership at Oklahoma State University and Administrator for the Brock International Prize in Education. He earned his Ph.D. from Texas A&M University, and his teaching, research and service activities focus on understanding and improving school culture. He can be reached at ed.harris@okstate.edu.

Sandra Harris is a Professor of Educational Leadership and has been a superintendent, principal, and teacher. She is the Dissertation Coordinator of Doctoral Studies at Lamar University in Texas, USA. She is past President of the National Council of Professors of Educational Administration. Her expertise is in personal cultural transformation and the role of cultures of inquiry in changing leadership understandings. Her research and teaching focus on cultural influences and relationships for leaders. She has published or co-published 17 books in school leadership. Examples are *BRAVO Principals: Building Relationships with Actions that Value Others* (Eye on Education, 2004) and *Challenges of No Child Left Behind: Understanding the Issues of Excellence, Accountability, and Choice* (Rowman & Littlefield Education, 2007). She is co-editing a book titled *Critical Social Justice Issues for Practitioners* (NCPEA Press, forthcoming).

Dr. James E. Henderson has served since 1992 as Professor of Educational Leadership and Director of the Interdisciplinary Doctoral Program for Educational Leaders in the Duquesne University School of Education. Jim also served as Dean of the School from 1995 until 2003. In 2009 he was named as the Founding Director of the UCEA Center for Educational Leadership and Social Justice and currently serves as Co-Director. In addition to his work with Duquesne, Jim was named a Distinguished Visiting Scholar at Union Institute & University in Cincinnati in 2007. Prior to his most recent posts, Jim served 22 years as a schoolteacher and administrator, the last 13 of which were in the school superintendency. Jim is a Senior Associate in Hazard, Young, Attea & Associates, Ltd., one of the premier educational consulting firms in the USA. His recognitions include selection as the recipient of the Award of Achievement for Service to the Profession by the Pennsylvania Association of School Administrators; the Junior Achievement National Silver Leadership Award; for the Rutgers University Distinguished Service Award; as a Kellogg National Fellow; and as a member of the *Executive Educator 100* jointly sponsored by AASA and NSBA. Jim took his bachelor's degree in Social Psychology from Princeton University, and his master's and doctoral degrees in Educational Administration from Rutgers University.

Phil Hunsberger is Senior Partner with Educational Equity Consultants, a firm focused upon dismantling racism in public education. He is a retired educator with 37 years of service as a teacher, administrator, central office administration, and Executive Director of two Illinois State funded reform initiatives. He served on the faculty of the National Conference of Community and Justice annual Dismantling Racism Institute for Educators and as the Director of the International Network of Principal Centers. In 1994, the National Association of Elementary School Principals selected him as the National Distinguished Principal from Illinois. He has authored a number of articles on school leadership, published journals for the *New Directions for School Leadership* and *Reading Research Quarterly* of the International Reading Association.

Munyaradzi Hwami, Ph.D., is a part-time lecturer in Educational Policy Studies, Faculty of Education, at the University of Alberta. Before coming to Alberta, he was with the Great Zimbabwe University where he was a lecturer in Sociology of Education and Research Methods and Statistics. His research experience is in higher education, post-colonial developments, and social justice issues. He is an author of several journal articles and book chapters on higher education in Zimbabwe. His most recent publications are entitled *Settlers, Sell-outs and Sons of the Soil: The Creation of Aliens in Zimbabwe and the Challenge for Higher Education* and *Neocolonialism, Higher Education and Student Union Activism in Zimbabwe.*

Sotiroula Iasonos is a primary school teacher in Cyprus and a doctoral candidate at the Open University of Cyprus. Her research interests are in social justice education, intercultural education and educational leadership.

Lindsayanne Insana is a doctoral student in Curriculum & Instruction at the University of Illinois at Urbana-Champaign. Her research interests include teacher education program reform and collaboration within higher education institutions. She currently works as a research assistant with the University of Illinois' College of Education redesign efforts. Lindsayanne's initial interest in social justice began when she worked as an elementary school teacher and recognized the discrepancies in post-program mentoring and induction services from state to state.

Patrick M. Jenlink is Professor of doctoral studies in the Department of Secondary Education and Educational Leadership and Director of the Educational Research Center at Stephen F. Austin State University. His experience includes classroom teacher, K-12 counselor, building administrator, and school district superintendent. Dr. Jenlink's teaching emphasis in doctoral studies at Stephen F. Austin State University includes courses in ethics and philosophy of leadership and scholar–practitioner models of leadership. His research interests include identity politics, democratic education and leadership, and social injustice in educational settings. In particular, the focus on injustice animates his philosophical position on social justice leadership, acknowledging that in the absence of a socially just practice injustices persist to the detriment of democratic society. He has authored numerous articles, guest edited journals, authored or co-authored numerous chapters in books, and edited or co-edited several books. Currently Dr. Jenlink serves as editor of *Teacher Education & Practice* and co-editor of *Scholar-Practitioner Quarterly*, both refereed journals. Books published include *Dialogue as a Means of Collective Communication*, Kluwer Academic/Plenum Publishing, *Equity Issues for Today's Educational Leaders: Meeting the Challenge of Creating Equitable Schools for All*, Rowman & Littlefield, and *Dewey's Democracy and Education Revisited: Contemporary Discourses for Democratic Education and Leadership*, Rowman & Littlefield. Dr. Jenlink's current book projects include *Ethics and the Educational Leader: A Casebook of Ethical Dilemmas* (forthcoming from Rowman & Littlefield Publishing Group), and *Educational Advancing Moral Literacy in Educational Leadership: Understanding the Dispositions of Moral Leaders* (forthcoming from Rowman & Littlefield Publishing Group).

Greer Johnson is Professor of language and literacy education and Director of the Griffith Institute for Educational Research. Her recent research takes a non-deficit approach to language and literacy education in disadvantaged communities, especially in Australian schools and communities with large Indigenous populations. Her focus is on facilitating "both-way" knowledge partnerships between school principals, Indigenous teachers and communities to achieve better outcomes for students. She has recently co-edited a book about productive pathways for at risk students in transitioning from school to post-school options: *Experience of School Transitions: Policies, Practice and Participants*.

Lauri Johnson is an Associate Professor and Program Coordinator of Educational Leadership at Boston College. She researches how White educators conceptualize race, historical and contemporary studies of community activism, and culturally responsive leadership in national and international contexts. Her writings have appeared in several journals, including the *Journal of Teacher Education, Journal of School Leadership, Leadership and Policy in Schools, Journal of Educational Administration, Urban Education,* and in three books: *Dealing With Diversity Through Multicultural Fiction: Library-Classroom Partnerships* (ALA, 1993), *Urban Education With an Attitude* (SUNY Press, 2005), and *Multicultural Policies in Canada and the United States* (Joshee & Johnson, UBC Press, 2007) which won the 2008 AESA Critics' Choice Award.

Marilyn Johnston-Parsons is a Professor in the Department of Curriculum and Instruction at the University of Illinois at Urbana-Champaign. Her major interested are teacher education reform, collaborative programs between schools and universities, and social studies education. She has a long history of working in alternative and urban school contexts and her commitment to issues of social justice come from experiences of working with diverse students and in low SES schools. A recent book written collaboratively with teachers leaders in a densely urban school is entitled: *Success Stories from a Failing School.*

Zorka Karanxha is Assistant Professor in the Department of Educational Leadership and Policy Studies at the University of South Florida. Her research agenda focuses on policies that positively influence marginalized communities through continued investigation of two interwoven conceptual strands: (1) social justice leadership praxis to reduce educational inequities; and, (2) social justice leadership to reduce inequities in legal education policy and policy implementation. These two research strands are guided by an overarching ethical leadership framework pillared by conceptions of justice, care, critique, and equity. Her intellectual inquiries and professional actions are designed to engage multiple paradigms of social justice with the understanding that educational leaders can be developed into individuals who contribute to the reduction of historical patterns of inequity.

Colleen Larson is Department Chair of Administration, Leadership and Technology in the Steinhardt School of Culture, Education, and Human Development at New York University. Her interests are rooted in the philosophy of social science, the methodologies of interpretive inquiry, and the sociopolitical theories of equity and opportunity underpinning social and institutional reform in schools serving low-wealth and immigrant communities of color. A member of the Educational Leadership, Politics and Advocacy Program and Interdepartmental Research Studies Faculty in Humanities and Social Science, she teaches courses in the politics of multicultural communities and approaches to interpretive inquiry methodology.

Angeliki Lazaridou is an Assistant Professor at the University of Thessaly, Greece. She has a B.Ed. and an after-degree diploma in Special Education-Early Intervention from the University of Athens, and an M.Ed. in Early Childhood/Special Education, and Ph.D. in Educational Administration and Leadership both from the University of Alberta, Canada. Her teaching and research interests focus on school administration and leadership, particularly on issues of effectiveness, ethics and values, gender, women, and learning communities.

Social Justice Platform

- Social justice leadership is authentic leadership focused on praxis that fuels change by unearthing issues of injustice, prejudice, inequity, oppression, and cultural misunderstandings.
- Social justice leadership is the vehicle to turn ordinary school into democratic learning communities of shared knowledge and practice.
- Social justice leadership begins with the reflection on our self-identities and involves the adoption of a multicultural lens to view the world.
- Social justice leadership flourishes in an ethos of cooperation and integration that empowers members of the organization to challenge conventional wisdom and to adopt a more cultural just worldview.
- Social justice leadership is rooted in humanitarian and cosmopolitan views of the world.

Ann E. Lopez teaches at the Ontario Institute for Studies in Education of the University of Toronto in the Department of Leadership, Higher and Adult Education. She is the program coordinator of the Concurrent Teacher Education Program. Prior to taking a university position, Dr. Lopez worked for 15 years as a secondary teacher and school administrator. She teaches foundation courses in teacher education as well as courses on educational administration and school leadership. She engages in research on culturally relevant teaching, teacher leadership, diversity and equity and social justice.

Allan Luke is a Research Professor at Queensland University of Technology. His research has had local, national and international impact across the fields of literacy, school reform and social justice. His latest work has involved him in an evaluation of a large scale reform program aimed at improving school outcomes for Indigenous students in Australian schools.

Linda L. Lyman is a Professor in the Department of Educational Administration and Foundations at Illinois State University. She has a B.A. in English from Northwestern University, and M.A.T. from Harvard University, and a Ph.D. in administration, curriculum, and instruction from the University of Nebraska-Lincoln. In 2005 she spent 6 months in Greece as a Fulbright Scholar, where she taught about women's leadership in American culture at Aristotle University in Thessaloniki. Her scholarship and publications, including four books, focus on leadership with an emphasis on issues of caring, gender, poverty, women, and social justice.

Social Justice Platform

- Retrace any path of justice and one discovers caring at its source.
- Justice supports the universal love of humankind undivided by gender, race, ethnicity, creed, nationality or sexual orientation.

- Social justice means that all people have the opportunity to earn a living wage.
- Social justice requires domestic violence against women to be eliminated.
- Social justice leadership crosses borders and builds bridges by challenging stereotypes and deficit thinking.
- Social justice leadership creates welcoming communities that embrace freedom and promote the democratic process in human organizations.
- *Critical evocative portraiture* promotes understanding, acceptance, and celebration of differences.
- Justice is a right of the essence of a person to be respected.

Katherine Cumings Mansfield, Assistant Professor at Virginia Commonwealth University, holds a Ph.D. in Educational Policy and Planning and a Doctoral Portfolio in Women's and Gender Studies from The University of Texas at Austin. Mansfield's interdisciplinary scholarship focuses on the history and politics of education and the relationship of class, gender, race/ethnicity, and religion on educational and vocational access and achievement. Mansfield has presented at: American Educational Research Association (AERA); *National Summit on Interdistrict Desegregation* at Harvard Law School; *Legal and Policy Options for Racially Integrated Education in the South and the Nation* at University of North Carolina-Chapel Hill School of Law; and University Council for Educational Administration (UCEA). Mansfield is published in*: International Journal of Urban Educational Leadership*, *Journal of Educational Administration*, *Journal of Research on Leadership Education*, and *Journal of School Leadership*. In 2012, Mansfield was awarded the "Leadership for Social Justice Dissertation Award," sponsored by AERA's Leadership for Social Justice Special Interest Group (SIG) and the "Selma Greenberg Outstanding Dissertation Award," sponsored by AERA's Research on Women and Education SIG. Mansfield's social justice agenda is informed by her lived experiences, including: growing up in lower socioeconomic circumstances, studying education as a first-generation college student, serving diverse populations throughout the preschool to postsecondary pipeline for over 20 years, and a lifetime of exploring justice issues as they relate to ethics and spirituality across cultures.

Daniel Johnson Mardones is a Ph.D. student in the Department of Curriculum and Instruction at the University of Urbana-Champaign, and has a Master in Curriculum and Educational Community from the University of Chile. His work has been focused on biographical approaches in curriculum theory and teacher education. His commitment to social justice comes from his early life experiences and was important in his decision to become a history teacher.

Dr. Priscilla Maynor is a member of the Lumbee Tribe. She is an Executive Vice President at the Center for Educational Leadership and Technology and leads the Shared Learning Systems and Leadership Development unit. She has more than 27 years of progressive leadership in public education and a solid background in education policy and reform, organizational development and change management. Dr. Maynor began her career as a special education teacher and administrator in the

Public Schools of Robeson County. Her state level experience includes various leadership roles with the North Carolina Department of Public Instruction (NCDPI). With NCDPI, she led several mid to large-scale statewide initiatives including the implementation of early childhood programs and a regional service delivery model to support transformation of the state's lowest performing districts and schools. Dr. Maynor also led strategic initiatives in communications, data management, professional development and research and evaluation. Her motivation is to increase access and educational opportunities for all students, particularly Native Americans. Dr. Maynor served on the North Carolina State Advisory Council of Indian Education for more than 10 years leading efforts to improve the education of the state's eight tribes. Her work with the State Council in collaboration with Native tribes significantly improved coordination, communication and support for schools, districts and Title VII American Indian and Alaska Native education programs. Dr. Maynor holds master's degrees in Special Education and School Administration and Supervision and a doctorate in Educational Leadership from the University of North Carolina at Chapel Hill. She is a William E. Friday Fellow for Leadership in Human Relations, a Barbara Jackson Scholar and a member of the National Indian Education Association.

Marva McClean is a literacy researcher and curriculum developer who specializes in international education, critical literacy, and the intersection of race, language, and leadership in the classroom. She is a cultural and community activist who explores issues confronting the Caribbean diaspora and in particular, social justice and equity in the society and in schools. She is currently researching and writing about the central position Nanny of the Maroons and Anancy, the West African spider occupy in the West Indian ideology of resistance, subterfuge and empowerment and the implications for transformative literacy leadership and learning.

Raj Mestry began teaching in 1973 as a post level 1 teacher and passed through the ranks of Deputy Principal and Principal at primary and secondary schools. He completed the B. Comm. (Hons), and obtained a *cum laude* in the M. Ed. (Education Management) degree. In 1999 he completed his D. Ed. in Education Management. In 2002, he joined the University of Johannesburg as senior lecturer and currently holds the position of Professor in the Department of Education Leadership and Management. He is actively engaged in the Education Leadership Institute (UJ-Harvard Graduate School of Education partnership) training school managers. This agenda has been extended to the training of school managers nationally as well as in the African continent (Namibia). He has successfully supervised numerous M. Ed. and Ph.D. students and has published extensively in both national and international accredited journals, written a chapter for an international book commissioned by the Commonwealth Secretariat, and co-authored four books in the field of education management and leadership in education. Raj serves on the executive committee of the Education Association of South Africa (EASA) and South African Education Law Association (SAELA). Until recently, he served as co-editor of the South African Education Management and Leadership Journal, and the editorial committee of the *South African Journal of Education*. The South

African education landscape has been severely hampered as a consequence of the apartheid policies and pertinent issues addressing social justice and equity are foregrounded in his research agenda.

Peter Miller completed his doctoral studies at the University of Utah and currently is on the faculty in the School of Education at the University of Wisconsin-Madison. His research and teaching focus on cross-sector collaboration in service of traditionally marginalized students and families. Much of his work unfolds on contexts of poverty and homelessness. Previously, Peter worked as a high school teacher in Montgomery, Alabama, and South Bend, Indiana.

Kavin Ming is currently an Assistant Professor of literacy in the Department of Curriculum and Pedagogy at Winthrop University, in Rock Hill, SC. Dr. Ming earned a B.A. in English, an M.Ed. in Special Education from Florida State University, and an Ed.D. in Special Education from Florida Atlantic University. Dr. Ming has been preparing future teachers for the past 5 years. Prior to entering higher education, Dr. Ming spent 8 years in the Florida public school system. During her tenure as a public school teacher, Dr. Ming advocated for children and parents in need of assistance to realize the full benefit of public education. Her research interests include: improving the academic success of students at risk for reading failure, using literacy strategies in content area learning, using technology to aid in literacy instruction, and using effective multicultural practices in classrooms.

Alejandra Montané López holds a Ph.D. in Pedagogy from the University of Barcelona (UB) and Bachelor of Philosophy and Science Education (UB) and master's degree in Education and Training the Trainers from the Autonomous University of Barcelona (UAB). She is a teacher at the Department of Teaching and Learning and Educational Organization (UB) and teaches in Social Studies Education (specialization Human Rights and Legal Subjects) and in studies of Pedagogy since 1997. She is also a teacher in the doctoral Ph.D. in the area of "Complexity, society and education". She has been visiting doctoral and post doctoral universities, among them the UQAM (University of Quebec in Montreal, Canada) and Lusophone University of Portugal. She is author of numerous publications in books and magazines as well as member of the editorial board and referee of several Spanish, Portuguese and Latin American specialized periodical publications. She is member of the consolidated research group Esbrina, Subjectivitats i Entorns Educatius Contemporanis dedicated to the study of the conditions and current changes in education in the world; member of CECACE (Centre for the Study of Change in Culture and Education – Scientific Park of Barcelona) as well as member of several national and international scientific associations.She is currently coordinator of the team of the University of Barcelona in the Ibero-American Network of Educational Policy Research (RIAIPE), which develops the project of the European Commission Alfa called "Inter-University Framework Programme for Equity and Social Cohesion Policies in Higher Education". Her last publication (2012) coauthored with J. Beltran is Исследования по социология образования в Испании (Research in the sociology of education: an overview of the situation in Spain) in Ivanova, A.M. Osipov. Veliky "Global Sociology of Education", NovSU; Moscow.

Maha Mouchantaf is the chairperson of the Department of English, Translation and Education and an Assistant Professor at Notre Dame University – Louaize, Lebanon. She holds a Ph.D. in Educational Management from Université de Corse – France, an M.A. in Educational Management from Lebanese American University and a B.A. in Communication Arts, Journalism and Radio/T.V. production from the same university. Her main research has focused on exploring gender differences, cultural diversity, and leadership styles in administration. She has a rich experience in school management and her research interests continue to center on issues related to "Shaping better Leaders" as well as on "Bridging the gaps in the Lebanese Educational System." She has conducted several trainings and workshops on leadership and management and has several publications on Female Leadership in Lebanon and on the issues pertaining to gender differences in school administration.

Carol A. Mullen is a Professor of Educational Leadership, Director of the School of Education, and Associate Dean for Professional Education of the College of Liberal Arts and Human Sciences at Virginia Tech, Blacksburg, Virginia, USA. Her inquiries focus on democratic and critical explorations of mentoring leadership theory and practice in K-12 and university settings. She served as President of the National Council of Professors of Educational Administration from 2012 to 2013. She was Chair of the Educational Leadership and Cultural Studies Department from 2007 to 2012. She is the long-term former Editor of *Mentoring & Tutoring: Partnership in Learning* (Routledge). Her authorships encompass more than 200 refereed journal articles and book chapters, 15 special issues of journals, and 16 books. Recent books are *The SAGE Handbook of Mentoring and Coaching in Education* (Sage, 2012); *Educational Leadership at 2050: Conjectures, Challenges, and Promises* (Rowman & Littlefield Education, 2012), and *From Student to Professor: Translating a Graduate Degree into a Career in Academia* (R&L, 2012). Her awards for scholarship, doctoral mentoring, and teaching include a book award from the American Educational Research association.

Alexandre Ibongya-Ilungu Muzaliwa, (Alex) Ed.D., an adjunct faculty for the University of Idaho, was originally a refugee to the USA from the Democratic Republic of the Congo (DRC). Dr. Muzaliwa is interested in how self-inquiry advances social justice, equity, and democracy. He earned his doctoral degree in Educational Leadership, University of Idaho, Boise. A former school principal, Alexandre also taught high school French and Social Studies. He published a chapter in the book *Social Justice Leadership for a Global World* (2012). His dissertation (University of Idaho, 2011) was entitled *Teaching and leading for diversity and social justice through narrative inquiry in secondary schools*.

Dr. Irene Muzvidziwa is a senior lecturer in the School of Education, University of KwaZulu Natal Pietermaritzburg campus. She is a holder of a diploma in Education from the University of Zimbabwe, B.Ed. and M.Ed. degrees from the Waikato University, New Zealand, and in addition, she holds a doctorate in educational leadership from Rhodes University South Africa. Irene's interest in teaching dates back to 1981 when she briefly worked as a pre-service teacher in a rural school in Southern Zimbabwe. Her university teaching experience started at the Waikato

University in 1998/1999 when she was appointed as one of the tutors in the School of Education. She was appointed lecturer and taught at the Zimbabwe Open University and the University of Zimbabwe before she joined the University of KwaZulu Natal. She has taught and successfully supervised students at both undergraduate and post-graduate levels. Her early experiences have had a bearing on her interest in understanding issues of women and education as she started as a school secretary, bursar and later registry clerk in the Ministry of the Public Service. She is very passionate about gender and education. Her area of specialization is educational leadership and management of change in education. She has researched and published book chapters and articles in scholarly journals on issues pertaining to educational leadership, culture and educational change. She has researched on the experiences of women school principals, the impact of principalship and the senior management team on school development and learner achievement.

Judith Naidorf is a Doctor of the University of Buenos Aires (UBA), Faculty of Arts, Educational Sciences Area, Bachelor of Science in Education (UBA) CONICET Researcher based in the Research Institute of Educational Sciences (ICSI-UBA), and Regular teacher "Education I. Systematic analysis of processes and educational activities" of the Department of Educational Sciences (UBA). Clacso earned scholarships in the "Higher Education in Latin America and the Caribbean" in 2002. During 2002 and 2008 Faculty Research Grant Program International Council for Canadian Studies. Fellow Secyt stimulus-UBA (1999) and CONICET doctoral (2001) and postdoctoral (2006). Judith has authored several books such as *The Changes in the Academic Culture of the Public University* (Eudeba, 2009) and co-authored with Llomovatte, Juarros and Guelman (2006) "the university-business. Glances reviews from the public university" (Miño and Davila, 2006). UBACYT project Director (2008–2010). She studies the social relevance of the university as academic cultures in Argentina, Brazil, Mexico and Canada and is currently Director of the PIP Project (CONICET) 2012–2014,titled "Current Intellectual production conditions and their impacts on the creativity of academics Argentine public universities" under the Programme for Research in Sociology of Education by Silvia Llomovatte. She has taught graduate seminars and lectures at universities in Argentina and abroad.

Julie Nicholson, Ph.D. is a Visiting Assistant Professor at Mills College in Oakland, California. A former preschool and elementary school teacher, she completed her master's and Ph.D. in Early Childhood Education from the University of Michigan. Dr. Nicholson directs the Leadership Program in Early Childhood, a graduate program with a strong emphasis in social justice and equity, international scholarship, feminist post-structural and critical theoretical perspectives, and inquiry and collegiality as the foundations for influencing positive change for children and families. Dr. Nicholson works with graduate students to learn about the policy process in ECE and to gain strategies for working in the spirit of Debra Meyerson's description of the "Tempered Radical" to work within systems as they exist while also effectively inspiring changes to include individuals at decision-making tables whose voices have been traditionally marginalized from leadership and policymaking. Dr. Nicholson is an active member of the Oakland Education Cabinet's Prenatal to Eight committee, Chair of the Bay Area Coalition for Play and an Advisory Member for Alameda County's Race to the Top Early Learning committee developing a Quality Rating and Improvement System for ECE programs. Dr. Nicholson is Principle Investigator on several research projects including: Making Inclusive Leadership Visible in Early Childhood: Stories from the Field of Leading for Social Justice and Equity, the Global Play Memories and Child Play Narratives Projects and a new project documenting a professional learning community in a large urban school district for teachers working in California's newest grade, transitional kindergarten.

Juan Manuel Niño earned a Ph.D. in School Improvement from Texas State University-San Marcos and is currently a Assistant Professor at the University of Texas – San Antonio. Juan has extensive experience in urban public education, and he has served in numerous capacities, including substitute teacher, academic and athletic coach, classroom teacher, assistant principal, and district level administrator. As such, Juan understands the complexity of the public educational system, the accountability movement, and he has written extensively on the unintended consequences of standardized testing as a means to measure students' knowledge. His research interests center on challenging the "best practices" approach and helping educational leaders understand that schools are evolving and living organizations. Subsequently, Juan centers the notion of school improvement as a continual process, not a product. Other interests that guide his research include leadership preparation programs for social justice leaders, especially the preparation of assistant principals and superintendents. He is currently working on multiple projects researching instructional supervision for diverse students, instructional leadership, and intersectionality.

Jan Oakley is a contract lecturer in the Faculty of Education and Department of Women's Studies at Lakehead University in Thunder Bay, Canada. Her research and teaching interests include social justice pedagogies, critical theory, feminist theory, and humane and environmental education.

Izhar Oplatka holds a Ph.D. from The Hebrew University of Jerusalem. He is Professor of educational administration and head of the Executive Program of Educational Administration and Leadership at The School of Education, Tel Aviv University, Israel. Professor Oplatka's research focuses on the lives and career of school teachers and principals, educational marketing, gender and educational administration, and the foundations of educational administration as a field of study. His most recent books include *The Legacy of Educational Administration: A Historical Analysis of an Academic Field* (2010, Peter Lang Publishing); *The Essentials of Educational Administration* (2010, Pardes Publisher, in Hebrew); *Women Principals in a Multicultural Society* (2006, Sense Publisher, with Rachel Hertz Lazarowitz). Professor Oplatka's publications have appeared in varied international journals including *Educational Administration Quarterly, Journal of Educational Administration, Educational Management Administration & Leadership, Comparative Education Review, Teacher College Record, Canadian Journal of Education Administration and Policy, International Journal of Leadership in Education,* *Journal of Education Policy, School Leadership & Management, Urban Education, International Journal of Educational Management,* and so forth.

Courtney L. Orzel, Ed.D. currently serves as Superintendent of Forest Ridge Elementary School District, in Oak Forest, Illinois. She is an experienced educator with 14 years of experience in public education, having worked as a middle school teacher, high school teacher, assistant principal, and principal. Dr. Orzel recently received her Doctorate in Education from the University of Illinois at Urbana-Champaign. Her current research interests examine the notions of transformative leadership, equity and access in schools, inclusive leadership, social justice, and dialogue.

Ahmad Oweini is an Associate Professor of Education at the Lebanese American University and former Chairperson of the Department of Education (2007–2010). His educational background includes psychological counseling, higher education student advisement and orientation, and special education (learning disabilities). He has co-authored two high school textbooks in English and is active on the lecture circuit, giving talks and workshops to parents and teachers on issues related to intelligence, homework, study skills and behavioral management. Ahmad is certified by the City of New York as a trilingual educational evaluator. He is the founder of several Lebanese NGOs, namely Lebanese Psychological Association, Dyslexia Lebanon and Center for Arab Research and Development. His experiences with social justice started with a project in collaboration with Dyslexia International to adapt to Arabic an online dyslexia course to make it available to all students so that special education would help disenfranchised students in Lebanon and the Arab world and not be an elitist service.

Jill A. Perry is a Research Faculty member in the Department of Foundations and Leadership at Duquesne University. She is also the Director for the Carnegie Project on the Education Doctorate. A graduate of the University of Maryland, she received her Ph.D. in International Educational Policy. Dr. Perry's research focuses on professional doctorate preparation in education, organizational change in higher education, and faculty leadership in higher education. She has over 20 years of experience in leadership and program development in education and teaching experience at the elementary, secondary, undergraduate, and graduate levels in the USA and abroad. She is a Fulbright Scholar (Germany) and a returned Peace Corps Volunteer (Paraguay).

Chantale Richer is an elementary school principal in Montréal's downtown area. She has been a preschool and an elementary teacher for 17 years, a school principal at the secondary and the elementary level and was a lecturer at the Université de Sherbrooke. More recently she was coordinator of the Supporting Montréal Schools Program of the Ministère de l'Éducation, du Loisir et du Sport du Québec. She is a lecturer in teacher preparation and in leader preparation at the Faculté des sciences de l'éducation, Université de Montréal. She earned an M.A. degree in didactics from the Université de Montréal. She was the leader of a target school for the implementation of Québec's educational reform. As a principal she leads her school to promote equity and social justice. She has published one book in French with Jean Archambault, *Une école pour apprendre* (2007), Montréal: Chenelière Éducation.

David Rodríguez-Gómez is a lecturer in Teaching and Educational Admini-stration at the Applied Pedagogy Department of the *Universitat Autònoma de Barcelona*, and member of the Organisational Development Research Group (EDO). Recently, he has finished one project for promoting educational management and leadership in Latin America (http://www.redage.org), funded by Spanish Agency for International Development Cooperation. He is currently coordinating a project for widening access to higher education for underrepresented groups as well as for nontraditional learners in Latin America. His research interest includes knowledge management, educational administration and leadership, organizational learning, organizational development, ICT in Education and university drop-out.

Constance Russell is Associate Professor and Chair of Graduate Studies and Research in the Faculty of Education, Lakehead University, Canada. She is also the editor of the *Canadian Journal of Environmental Education* and co-editor of the forthcoming *Environmental Education Reader* and the book series, *(Re)Thinking Environmental Education* (both Peter Lang). Growing up poor on a family farm outside a small village in Canada, in many ways she had an idyllic childhood surrounded by a loving extended family in a landscape she knew intimately. But she also experienced sexism, classism, and fat bullying, and witnessed racism, homophobia, and the mistreatment of other animals, both wild and domestic. In retrospect, these childhood experiences spurred a lifelong commitment to social and environmental justice. Her university teaching has included courses in critical pedagogy, environmental education, outdoor education, nature and society, foundations of education, qualitative research methods, and proposal writing. She has researched and written on topics such as critical environmental and humane education (where, for example, she has used insights from feminism, ecofeminism, queer theory, fat theory, environmental thought, and critical animal studies), wildlife tourism, interdisciplinary collaboration, and qualitative research methodology. Her overarching goal in all that she does – in her teaching, her research and her service both within and outside the academy – is to work with others to help create the conditions in which all of us, human and more-than-human alike, can flourish.

James Ryan is a Professor in the Department of Leadership, Higher and Adult Education and co-director of the Centre for Leadership and Diversity at the Ontario Institute for Studies in Education of the University of Toronto. He has been teaching children and adults in various capacities since 1976. He came to OISE in 1991 after stints as a teacher and administrator in schools in northern Canada, and as a Professor of education at Lakehead University in Thunder Bay. His current research and teaching interests revolve around leadership, inclusion and social justice. His books include *Race and Ethnicity in Multiethnic Schools*, *Leading Diverse Schools* and

Inclusive Leadership, *Struggling for Inclusion: Leadership in Neo-Liberal Times*. He is currently conducting research into the political aspects of promoting inclusion and social justice.

Dilys Schoorman earned her Ph.D. in Curriculum and Instruction at Purdue University, IN. A native of Sri Lanka, she views herself as a transnational whose experiences in each national context inform and enrich her work and interactions in the other. She is currently a Professor in the Department of Curriculum, Culture and Educational Inquiry at Florida Atlantic University where she teaches courses in Multicultural/Global Education, Curriculum and Instruction, and Critical Theory. She is particularly interested in and concerned about the experiences of recent immigrant populations and the de-professionalization of teachers at a time when there is a critical need for innovative and creative teaching among our increasingly under-served populations. Committed to the notion of critical praxis, she challenges herself and her students to move beyond teaching and learning as compliance, towards experiencing teaching and learning as joyful, rigorous and transformative. Her scholarship is grounded in the conceptualization of "research as service" where "good" research is defined by its service to the public good rather than a matter of individual accomplishment. Her scholarship is informed by her work with preliterate Maya immigrants and their struggles for equitable education for their children in school systems where teachers' creative potential is hampered by testing regimes; and her collaboration with teachers, in the USA and in Sri Lanka, committed to serving the needs of diverse populations despite institutional and social challenges. She is grateful to such communities of practice among under-served groups that foster her continued education as a university professor.

Whitney Sherman-Newcomb is currently an Associate Professor in the Department of Educational Leadership at Virginia Commonwealth University in Richmond, Virginia, USA. Her research interests include: leadership preparation and mentoring; women's issues in leadership; social justice in leadership; and ethical leadership. Dr. Newcomb's work has been featured in journals including: *Educational Administration Quarterly*; the *Journal of School Leadership*; the *Journal of Educational Administration*; *Educational Policy*; and the *Journal for Research on Leadership Education*. She received the 2011 Distinguished Scholarship Award for VCU's School of Education for her contribution to research and the 2012 Distinguished Teaching Award for excellence in teaching. She serves on the editorial boards of *Educational Administration Quarterly*, the *Journal of School Leadership*, and the *Journal for Research on Leadership Education*. Dr. Newcomb is also a co-editor for a book series on educational leadership for social justice published by Information Age. She was presented with the Emerald Literati Award for Excellence for the Outstanding Special Issue of 2011 for her work as guest editor of "Globalization: Expanding Horizons in Women's Leadership," a special issue of the *Journal of Educational Administration*. Dr. Newcomb also received the 2011 Social Justice Teaching Award from the Leadership for Social Justice SIG of the American Educational Research Association "for work that represents exemplary commitment to teaching that promotes social justice, equity, diversity, and inclusion in the field of educational administration."

Teresa Socha, Ph.D., is an Associate Professor and Chair, Undergraduate Studies in Education in the Faculty of Education at Lakehead University, where she teaches and researches in the areas of health and physical education.

Lourdes Diaz Soto is the former Goizueta Endowed Chair at the University System of Georgia and recently retired as a Professor at Florida Atlantic University in the department of Culture, Curriculum, and Educational Inquiry. She was the Director of the award winning Bilingual-ECE project while teaching at The Pennsylvania State University; and, was also the Director of Bilingual-Bicultural Education at The University of Texas at Austin. An international and national scholar in the fields of Early Childhood Education and Bilingual/Bicultural Education with numerous refereed publications, book chapters and books including *Making A Difference in the Lives of Bilingual/Bicultural Children*, *Childhoods: A Handbook*, *Teaching Bilingual/Bicultural Children: Teachers Talk about Language and Learning*, and *Latina/o Hope.*

Robert J. Starratt is Professor of Educational Leadership at Boston College. His work with schools has taken him to various states in the USA, as well as to Australia, Canada, Ireland, Sweden, India, and various countries on the Pacific Rim. His recent publications have focused on ethical leadership in education and the moral character of teaching and learning. He received the Donald Willower Award for lifetime achievement in the field of Ethics and Educational Leadership, as well as the Roald Campbell Award for lifetime achievement in Educational Leadership from the University Council for Educational Administration.

Jane Strachan retired in December 2011 from her position as an Associate Professor at the University of Waikato in Hamilton, New Zealand. Her teaching and research interests focused on educational leadership, social justice, gender, women, policy development, and Pacific education. For 10 years she lived and worked in Vanuatu and the Solomon Islands assisting the government with Education and Women's human rights policy development, teacher education, and research. She has published widely on these subjects.

Social Justice Platform

- I believe that greed, hatred and the abuse of power by individuals and by governments profoundly disadvantage, oppress and cause misery.
- Feminism is the guiding philosophy for my social justice activism.
- Feminism is a commitment to support, to take action and to advocate for and with others.
- Feminism has a very broad social justice agenda based on human rights and fairness.
- Feminism is social justice work that takes place in many contexts.
- Feminist social justice work is lifelong.
- Feminist social justice work is work in partnership with others.
- Economically developed countries have a moral obligation to financially assist and provide expertise to economically developing nations.

António Teodoro is a Full Professor of Sociology of Education and Comparative Education at Lusophone University, at Lisbon. He is Director of Institute of Education and Research Center CeiEF, and Editor of *Revista Lusófona de Educação* (Lusophone Journal of Education). He was born on May 7, 1950, in Azores, Portugal. He has a Ph.D. and a master's degree in Educational Sciences. He is a founder of free teacher trade unionism in Portugal after the Portuguese Revolution in April 1974 and was the first general-secretary of FENPROF, the most representative Portuguese teacher union since 1994. Antonio was also Chief Inspector of Primary Education (1974–1975), member of National Council of Education (1988–1994), and Advisor of Minister Council from Education, Science, Culture and Employment (1995–1999). He is an International Adviser from the Paulo Freire Institute, in Sao Paulo, and co-founder of Portuguese Paulo Freire Institute. After 2007, he took on as the general coordinator of RIAIPE (Ibero-American Network of Education Policies Research) leading an Inter-University Framework Program for Equity and Social Cohesion Policies in Higher Education, funded by the EU Alfa Program.

Monty Thornburg in 1968, after graduation from Golden Gate University, San Francisco, Monty moved to the Black Belt Region of Alabama as a teacher corps intern. His participation in the events surrounding that historic and "turbulent" time for "Social Justice" has inspired him since. The teacher corps program led at Livingston University by Dr. Robert Brown saw interns actively participate in voting rights and other civil rights activities. A memorial event, April 4, 1969 for the slain Dr. Martin Luther King, Jr. was one of many events near the birthplace of the civil rights movement, Selma and Montgomery, Alabama. He learned firsthand of the racist elements affiliated with the KKK, and in the week of April 4, 1969, Governor George Wallace tried to stop any participation in a Selma to Montgomery Memorial March for the slain Dr. King. Those events forced him to leave and begin work in New Orleans as he continued to "Search for Social Justice." Monty earned his Ph.D. in Educational Leadership at the University of New Orleans in 2001. He now works in K-12 education in the San Joaquin Valley Region of California as a "demoted" administrator and as a community activist on behalf of "at-risk" and displaced students. With this handbook chapter he continues to pursue his dream to research and write.

Selahattin Turan is a Professor in the department of educational sciences at Eskisehir Osmangazi University, Turkey, and is currently the Dean of the College of Education. He received his B.A. from Ankara University in 1990, M.A. in 1993, and Ph.D. in 1998 from the Ohio University and joined Eskisehir Osmangazi University College of Education faculty in 1998. His professional interests are educational policy and leadership, the organizational psychology of organizations, and alternative perspectives in education. He co-authored five books in educational studies and is the editor of *Journal of Education and Humanities: Theory and Practice* and he is on the editorial board of the Turkish *Journal of Educational Administration.* He is the president-designate of Economic Cooperation Organization (ECO) Educational Institute in Ankara.

Kersti Tyson is an Assistant Professor in Teacher Education at the University of New Mexico. Kersti taught middle school students mathematics in Taos, NM, and as part of an interdisciplinary team in Santa Fe, NM. Upon earning her master's in intercultural communication, Kersti spent 4 years working for the State of New Mexico on Teacher Quality Policies. She also taught in the alternative teacher licensure program at the Santa Fe Community College. In her doctoral studies at the University of Washington, she worked in the Elementary Education Program to implement and study the placement of pre-service teachers in community organizations as a part of their field service. In 2011 she completed her dissertation, *Listening Matters: Developing Listening Spectra for Engaging in Education.* As a learning scientist, Kersti is guided by the questions, "what makes learning work and for what purposes?" Kersti studies the roles of listening in teaching and learning interactions. She is particularly interested in who is heard in the classroom and how that matters, especially in light of persistent inequities in our educational practices.

Ned Van Steenwyk received his bachelor's and master's degrees at Wayne State College in Nebraska. Ned taught history and economics at Lakeview High School in Columbus, Nebraska, the American School of Asuncion in Paraguay, and the International School in Santiago, Chile.

Completing his studies for a Doctorate in International Education Development at Teachers College, Columbia University, he served as an education advisor in Honduras with the United Church Board for World Ministries and in 2010 retired from a 30-year career as a contractor and foreign service officer with the United States Agency for International Development (USAID), designing and implementing USAID education and work force development projects in Peru, Costa Rica and Honduras, conducting studies and project evaluations on basic and alternative education, and work force development for USAID in Columbia, Panama, Nicaragua, Guatemala, El Salvador, Honduras, Dominican Republic, Jamaica, and Barbados. During 2011, Dr. Van Steenwyk and Dr. Rolando Sierra Fonseca completed a study for the German International Development Agency (GTZ/GIZ) on the supply and demand for technical education in Honduras. Ned is currently semi-retired and working part-time with the family's renewable energy business in Tegucigalpa.

Berte van Wyk, Ph.D., is an Associate Professor in Philosophy of Education in the Department of Education Policy Studies, Stellenbosch University. He is rated as a social scientist by the National Research (NRF) in South Africa. His research focuses on three areas: African philosophy, higher education, and institutional culture. On African philosophy: he has published on several areas such as the African university, the future of university research in Africa, and the curriculum in an African context. Work in progress includes an edited book on indigenous concepts in education. This book invites philosophical, sociological, as well as political perspectives on how indigenous communities develop concepts which serves as drivers for (the) education that articulate their aspirations. On higher education, his research focuses on the form and direction which higher education should take and what new approaches and relevant paradigms are worth pursuing. Relevant publications here relate to: political consciousness, affirmative action, the transformation of university teaching and learning, and democracy and social justice. Institutional culture is an under-studied concept, and his doctoral students are researching the cultures of the higher education landscape in South Africa, such as Traditional Universities, Universities of Technology and Comprehensive Universities.

Duncan Waite is a Professor in the Education and Community Leadership Program at Texas State University. He earned a B.A. in philosophy from The University of Michigan and an M.A. and Ph.D. from The University of Oregon, the latter in Curriculum and Supervision. He is a qualitative research methodologist and has published extensively on instructional supervision, qualitative research, leadership, organizational theory, and both the macro and micro forces in/of education and educational leadership, all from a critical socio-cultural perspective. His recent work includes that done on corruption and abuse of power (especially in educational administration), the shortcomings of our organizational forms, imperial hubris, and corporativism. He is the founding editor of *The International Journal of Leadership in Education* (Routledge). Duncan believes – as his work demonstrates – that social justice work is also done in the exhumation and interrogation of the structures and processes which serve to subjugate us, our brothers and our sisters.

Gerald Walton is an Associate Professor in the Faculty of Education at Lakehead University in Thunder Bay, Ontario. Raised in working class in military communities across Canada during the 1970s and early 1980s, Walton survived on-going bullying during his childhood and "ex-gay" Christian ministry involvement during his 20s. Later, having acquired his Ph.D. from Queen's University in Kingston Ontario in 2006, he became a scholar, instructor, and public speaker on the implications of gender and sexuality diversity for society and education. His privilege as a white male provides him with the standpoint from which to teach and continue to learn about being an ally for people of color and women. His social position as queer and gender stereotypical, on the other hand, provides him with an outsider vantage point from which to "see" straight privilege. He raises the challenge to straight people, including pre-service and current teachers, to be allies of people who are marginalized on the basis of sexuality and gender minority status. Walton shares his personal experiences, research, and scholarship with a wide variety of audiences, including academics, social activists, students in schools, and the public at large. He has published his work in academic journals, professional periodicals, newspapers, and blogs. His edited collection called *The Gay Agenda: Claiming Space, Identity, and Justice* will be published by Peter Lang in 2013.

Amy L. Warke, Ed.D., currently serves as an Assistant Superintendent of Learning and Instruction in the suburbs of Chicago, Illinois. She is an experienced educator with 19 years of experience in public education, having worked as a special education teacher, assistant principal, principal, and assistant superintendent. Dr. Warke recently received her Doctorate in Education from the University of Illinois at Urbana-Champaign. Her current research interests include equity and access in schools, social justice, transformative leadership, and homelessness.

Hilarie Welsh earned her Ph.D. in Curriculum and Instruction from the University of Illinois in 2012. She is currently an Assistant Professor at Loras College. Her research interests include the involvement of teacher preparation programs in novice teacher induction, the promising practices and improvement of teacher education programs, and the collaboration between Pk-12 schools and teacher education programs. Hilarie's passion for social justice was ignited when she became a high school English teacher. Although she did not learn about terms such as "social justice" and "othering" until graduate school, her work in the public schools helped her realize her passion for these topics. She continues to keep social justice at the heart of her work as she prepares future teachers at Loras College.

Damaris Wikramanayake received her Ph.D. in Education from the University of Sydney in 2010 with a thesis focusing on education policy and planning in Sri Lanka, in the context of economic globalization. Her research analyzed policy making over a period of 10 years to identify the influence of historical legacy, policy environments and the role of donors on the direction of education reform. Damaris also obtained a master's degree in Educational Administration from Michigan State University and received a Phi Kappa Phi award for her achievement in this course. Her first love has always been the Classics. Obtaining a First Class Honours Degree in Western Classical Culture, she started her career in education first as a Secondary school teacher and later served as an administrator. She brings to her research a wealth of both teaching and administrative experience. Damaris, at present, is an Education Consultant to the World Bank in Colombo, Sri Lanka, working on the Transforming School Education Project. Her focus here is the Program for School Improvement which promotes the idea of School Based Management and School Based Teacher Development. More recently her work has focused on social cohesion and how this could be achieved through education, especially in the Sri Lankan context in the aftermath of war. Damaris has authored a paper on "The Promotion of Social Cohesion through Education in Sri Lanka" for the World Bank.

Nereda White is an Aboriginal academic and Director of the Centre for Indigenous Education and Research at the Australian Catholic University. She is from the Gooreng Gooreng people, the traditional owners of the Bundaberg area of Queensland. Over 20 years, Nereda has devoted her energies to supporting the life aspirations of Indigenous Australians who continue to be severely disadvantaged in every area of life. She has made a significant contribution to Indigenous Higher Education in Australia through her teaching, scholarship, leadership and community engagement; by encouraging many Indigenous people on their learning journeys; and by fostering reconciliation between Indigenous and non-Indigenous Australians. In recognition of her leadership, Nereda has received two national university teaching awards: a Citation for outstanding contribution to student learning (2006) and the Neville Bonner award for Indigenous Higher Education (2007). She is committed to the inclusion of holistic approaches to student learning in keeping with traditional Indigenous ways; the incorporation of Indigenous knowledge in the curriculum; supporting the leadership capacity of Indigenous people in teaching, learning, research and governance and developing shared leadership through partnerships between schools and Indigenous communities. Nereda's hope is for a socially inclusive society where her grandchildren can grow up and be educated in a community that supports them in their Aboriginal heritage and allows them along with other Indigenous children to develop to their full potential and have the opportunity to participate fully in the life of Australian society.

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Chapter 1
Introduction: Do Promises of Social Justice Trump Paradigms of Educational Leadership?

Ira Bogotch and Carolyn M. Shields

Our commitment and responsibility as educators is to explicitly and publicly combat ignorance. In so doing, we enter into public discourses to justify our purpose, words, and actions. That is what the authors in the handbook mean to do—not as philosophers, sociologists, anthropologists, economists, political scientist, or artists but as educators explicitly. In other words, who we are professionally ought to inform how we act as citizens in the world and vice versa. Our professional selves ought to be aligned with our citizenship.

As educators, and here as editors, we present this handbook in the spirit of inclusiveness (see Ryan, Chap. 21 in this volume). We mean this literally. That is, we do not write or think about social justice as if it is a specific delimited topic of interest. For this reason, social justice cannot fall outside an educator's research agenda or even reside on the margins; rather, social justice is a necessary and fundamental assumption for all educators committed to combating ignorance and becoming more informed global citizens. Just as Jack Culbertson from the USA reached out to William Walker from Australia in 1963 about the possibilities of staging an international conference for discussions on educational administration, we, too, continue to reach out internationally to readers across all fields of education. Our intent is not to impose one way of knowing, thinking, or interpreting histories—which is why we chose the format of an international handbook in the first place.

An international handbook lets readers choose which chapters to download and read. Readers from all backgrounds can reframe their approaches to social justice independently. Every chapter builds an historical and contemporary social justice

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bridge across professions, disciplines, research methods, and theories. To assist readers in navigating the two volumes of the handbook, we provide a table of contents, brief author bios, abstracts, and key words.

Bringing together the purposes of education with citizenship is not original. John Dewey (1915, 1938) for over a half century approached the gaps between school and society through his progressive ideas on experiences in learning school subjects, democratic human relationships, and scientific problem-solving. His comparative analyses of traditional practices found in schools contrasted with his critical and reflective methods on reconstructing knowledge for improving society. These constructs were, at heart, pathways for educators working towards social justice (Bogotch, 2002). Dewey's ideas were not reducible to convergent thinking, either-or polarized thinking, standardization, or best practices. Yet today, in too many contexts throughout the world, perhaps most notably inside the school reform movements in the USA (e.g., No Child Left Behind/Race to the Top), educational leaders find themselves on an unsettling middle passage journey to what Dewey would call amoral actions and miseducative practices (Bogotch, 2012a; Bogotch & Roy, 1997). Good people, hardworking people, and well-intentioned people committed to improving schools find themselves in frustrating positions where the only pathways they can see are too often ones prescribed and scripted by others, where educators are not free to create policies and programs which meet the needs of children and communities. A recent large-scale empirical study in the United States entitled the *Snapshots of School Leadership in the 21st Century* (2012), edited by Acker-Hocevar, Ballenger, Place, and Ivory, based on 27 focus groups, painfully described the negative impact of externally driven policies on implementing school-level reforms. Others, in many countries, describe similar phenomena. The above book is a cautionary tale for the rest of the world to read, and it is our hope that this international handbook will provide twenty-first-century educational leaders with alternatives ideas and pathways that are far more educative going forward.

As both Raymond Callahan in the Education and the Cult of Efficiency (1962) and Tyack (1974) in One Best System documented several decades ago, education and educational leaders are still often swallowed up by dominant business and governmental interests which today often represent global, corporate, and capitalistic (see Waite, Turan, and Nino, Chap. 33 in this volume) interests gone awry. Mainstream educational policies and practices eschew critical and culturally relevant pedagogies (Ladson-Billings, 1995), culturally relevant leadership (Beachum, 2011; McCray & Beachum, 2011; Weaver, 2009), and culturally responsive methodologies (Tillman, 2002). Educational leadership is still dominated by technical approaches to efficiency and effectiveness. The authors in this handbook join with those just cited and many others in describing how educational leadership for social justice must be deliberately focused on disturbing, if not disrupting, conventional wisdom and dominant school practices. In organizing the sections of the handbook, the editors chose to interpret traditionally named practices such as research methods, leadership theories, educational policies, professional development, and leadership preparation, as interventions so as to create spaces to actively build bridges to socially just practices within and beyond schools and universities.

Each chapter in this handbook—all 62, not just a handful—defines the meanings of social justice within a specific context or seeks to undo the legacies of injustices within a specific cultural context before articulating a way forward (see Chap. 62). In this sense, the handbook goes from today's "state of the art" based on confining social justice to a single prong of the field of educational leadership or as comprising a single chapter inside a large volume (see English, 2011; Murphy, 2002) to a thorough re-centering of educational leadership as a field that is directly responsible for addressing social, political, and economic injustices around the world. For many mainstream empirical researchers, this position goes well beyond what the paradigms of school improvement and organizational science assert. Instead, here every chapter deconstructs the conceptual and methodological limitations of school improvement and reform by acknowledging and learning from histories (Blount, 2008) and engaging in political discourse grounded in unique local contexts (e.g., Beabout, Chap. 30 in this volume). That is, the where-when-how-to-proceed related to social justice will always be focused on redressing wrongs and overcoming inequities, but it will always also be different in different settings, for history and contexts matter, and, it is past time that our theorizing, research designs and methods catch up with today's complex contextual realities and break with traditionally inscribed and restrictive research procedures and protocols.

The histories and current events of nations of conflict, in particular, whether Cyprus (Chaps. 21 and 45), Sri Lanka (Chaps. 13 and 47), or Lebanon (Chaps. 37 and 44), are unfolding differently, thus necessitating that their citizens engage in nation-specific social constructions of socially just futures, regardless of what the International Monetary Fund (IMF) or World Bank prescribe as the way forward (see Sen, 1999; Stiglitz, 2006). For example, the window for educational and economic change in Honduras in Central America, described in this volume by a former USAID contractor (Chap. 49), does not necessarily apply to its neighbors, let alone to how either South Africa or Zimbabwe (Chaps. 29, 34, 41, and 54) might need to define their way forward. In that sense, we all are living metaphorically in the "praxis wetlands" (see Gonsalvez, Chap. 32) where local contexts and experiences determine next steps in activist research. Wherever vestiges of sexism, racism, and genocide intersect, then awareness, consciousness, apologies, restorative justice, and rectification (Roberts, 2005), while necessary, are never sufficient. We believe counternarratives, advocacy, and activism open up new spaces (Mansfield, Chap. 3; Jenlink, Chap. 20; McClean, Chap. 27) for social and political actions to be initiated by educational leaders.

The chapters in the handbook are divided into the following parts: Conceptualizing Social Justice (Part I, Volume 1), Research Approaches to Knowing/Studying Social Justice (Part II), Leadership for Social Justice (Part III), Advocacy/Advocates for Social Justice (Part IV), Sociocultural Representations of Social Injustices (Part V, Volume 2), Glocal Policy Interventions (Part VI), and Leadership Preparation as a Social Justice Intervention (Part VII). Although the handbook prioritizes leadership in each and every part, the order of the parts reflects how we approached social (in)justice, first in terms of conceptualizing the constructs, second in terms of knowing/studying systematically, and then third as leadership for social justice. The idea that each part would not only reflect how traditional topics could be transformed into deliberate interventions but also how each topic would describe a sustainable process contextually. The first volume concludes with the part on advocacy/advocates, a topic that often has been relegated to the margins by mainstream academic discourses. From our editorial perspectives, the order of handbook parts was as much a political decision as it was epistemological—which is how we see all of education.

The arguments presented here view social justice interventions as sufficiently robust constructs for breaking down barriers and borders, even the borders from part to part. It is these spaces and bridges that allow us to learn how to creatively and joyfully fill those spaces with lived experiences, professional development, and lessons learned. We, therefore, invite you to discover, as we have, the numerous ways in which spaces and bridges metaphorically interact to transform educational leadership into imagined spaces where the poor and powerless have voices along with privileged and advantaged citizens of the world. As with all concepts here, it is for every generation in every region of the world to decide on the contextual meanings and subsequent actions. It is up to you as readers to contextualize the narratives and reinvent theories/actions so that policies, advocacy, and practices can be implemented locally, nationally, and internationally.

Writing about social justice, democracy, equity, inclusiveness, or any of the over 60 reforms and theories presented here will not make social justice a lived reality for all students, teachers, administrators and their communities. But our communications and community building are two places for us to begin again. Unlike traditional handbooks written by the respected community of established senior scholars, this International Handbook of Educational Leadership and Social (In)Justice is unique in that it is not primarily a retrospective synthesis of leadership for social justice nor a snapshot of where we have been. While you will find many prominent names in these two volumes, some as authors, many others as citations, we designed the handbook invitationally, seeking scholars from special education, health education, urban education, and literacy, learning, and teacher leadership, as well as educational leadership. We viewed our task in terms of connecting educators, rather than promoting experts in specialized fields of study. And what we asked of our contributors was for them to connect their ideas, reforms, research methods, and programs to both educational leadership and contextual meanings of social (in)justice.

We used the term (in)justice in the title of this handbook deliberately. Too often, the term social justice is used to imply a soft and nebulous notion of caring about someone or something beyond our borders. Sometimes it refers to creating more accessible and inclusive educational systems without attention to the quality of such systems. Sometimes it refers to a change that has been achieved through negotiation that results in a win-win solution—one that leaves the fundamental injustice in place even as it tweeks an aspect of it in some way. Yet, injustice is always concrete, palpable for those who suffer it and for those who encounter it. It cannot be overlooked, glossed over, or ignored. For that reason, we asked our authors to specifically consider injustice in their contexts and to develop a robust concept of leadership that could address it.

Over 100 researcher-authors have shared their social justice ideas. Only about 15 % are non-Western, and so we know we must continue to reach out to scholars around the world. While the handbook is international, it is not representative of peoples everywhere. About 25 % of the authors do not write or speak English as their first language. In a special issue on “Who Controls Our Knowledge” in the International Journal of Leadership in Education (Bogotch, 2012b), the phrase “linguistic imperialism” is mentioned not just as a methodological limitation but in terms of how our knowledge loses local contexts and local problems when researchers have to write in English for Western journals. From Malaysia, we read

> …the domination of the English language in the reputable international journals creates difficulties for scholars and universities that do not use English…This is a perpetual concern among local policy-makers and to nationalists that there will be less commitment to the use of the national language and to publication in less prestigious local journal as researchers conform to the interests of prestigious English dominant journals in order to want their work published. (Tie, 2012, p. 445)

From Brazil, we read that

> With regard to social problems,… journals driven by powerful companies – with some exceptions – are not much interested in publishing what is contextualized in Brazil or what the health problems are in Brazil. This particular form of intellectual colonization subjugates what in many countries and regions, like Latin America, is recognized as strong production…. (Bosi, 2012, p. 455)

From Spain,

> So far, we have identified two main forms of oppression: … the impact of the dominance of English as a scientific lingua franca in the life of academic individuals, for whom the subordination to English may signify limitation and impoverishment (Siguan, 2001, p. 69); and,… a more political impact of the phenomenon, that is, on problems such as the difficulty in sharing information with other colleagues who do not use English as an academic language, the separation from our objects of study and the fractured dialogue with local authorities responsible for local policies. (Suarez-Ortega, Garcia-Mingo, & Ruiz San-Roman, 2012, p. 476)

Although the emphasis on social justice asks us as educator-citizens to look at macro-level injustices, we professionally also need to be much more critical of our own practices which continue to subjugate certain individuals and knowledge bases (local and contextual). We acknowledge these faults and limitations in this handbook, while as coeditors, we find it hopeful that about 36 % of the authors represent tomorrow’s generation of social justice scholars—a fact that speaks to how we chose to meet the challenges of intergenerational legitimacy (Rawls, 1971) for social justice theories. We are grateful for the young and not-so-young scholars who chose to contribute their original ideas here in this first of its kind reference book. The next steps, in terms of dissemination, however, are still to be decided.

Also, with respect to representation, we acknowledge that many places in the world are so hostile to education or to free speech that it would be unrealistic as well as dangerous for their works to be included. Schoorman (Chap. 13 in this volume) states this explicitly with respect to her home country, Sri Lanka. Unnamed authors wrote to us during the Arab Spring apologizing for their inability to carry out the studies/research they had originally proposed. Such is the state of the world and its effects on schools, teachers, administrators, and researchers. At the same time, there are economic and political ideologies which thrive on promoting a particular kind of education which thwarts opportunities for learning and/or promotes hatred of particular racial, tribal, and ethnic groups. In the West, free public education is often taken for granted as a default stance where we ignore the power of education to win the hearts and minds of a nation's population. Only when education is threatened is there a clear sense of urgency which challenges the idea of education as business as usual. In dangerous situations, schools are not sanctuaries or safe havens for children or adults. Moreover, in contexts that seem calm and safe, schools are still not safe havens for many children and adults, especially those who may be in some ways "different" from the dominant population. We must protect schools and education if we are to save communities and nations. That is how John Dewey saw schooling, that is, as practices which protect democracy as a way of life, not as governmental structures. Default business-as-usual educational stances are unacceptable anytime, anywhere when educators care about children and adults in difficult and unjust circumstances.

That said, we see the content in these two volumes as both safe and dangerous—safe in the sense that social justice educators have joined together here in struggle as a loosely coupled community and dangerous in the sense of providing the impetus and encouragement to speak out and enact socially just interventions. Interventions by design are meant to transform ordinary practices of schooling into processes which deliberately question, challenge, and create spaces and bridges to success for those who are struggling.

By the time you come to Chap. 62, the conclusion, which is titled The Way Forward, we hope socially just political, social, and economic ideas will be viewed as part of educational leaders' ordinary practices and responsibilities (Boske, 2012; Marshall & Oliva, 2006; Tooms & Boske, 2010). There we will emphasize that the way forward is also about the injustices and legacies of the past. The way forward requires that we honor histories rather than forget historical and educational facts as if new educational reforms and programs are acceptable as ahistorical and acontextual. We understand that the world is more complicated and technologically connected through social media than ever before and that schools must change pedagogically and structurally, and that means our theories, methods, policies, and programs must also reflect our changing times. This is particularly true for how we conduct research going forward. And lest we never forget, what we are striving for is also to recapture the joys of education as articulated by Griffiths (Chap. 14 in the volume).

While each chapter author pays tribute to her/his legacy in the 62 reviews of literature, we, too, want to acknowledge a few of the researchers on whose intellectual and ethical shoulders we now stand. Our focus will not be on great minds from other academic disciplines who inform and challenge us to think broader and deeper but will draw from the wide and eclectic field of education in general. Other disciplinary ideas can always serve us, but not as ideas divorced from education. Dewey and his colleagues, whether at the University of Michigan, the University of Chicago, or Columbia University, were influenced by him to see that educational facts and ideas stand alongside philosophical, social, religious, industrial, and commercial facts and ideas, each sustaining the other. It is interdisciplinary linkages, not discrete disciplines that we believe to be the proper role of education as part of and central to the knowledge base. Our purpose here was to create a handbook that honors our past and present so as to redefine educational leadership to advocate and help to create our future as more socially just for all around the world. While we are critical of academic discourses as communication silos, we now ask you to join us in viewing APA (American Psychological Association) citations as a way of saying "thank you" to members of the academic community, past and present, who have helped us to think more clearly and guide us forward on our social justice journey.

Thank You to …

In a seminal book titled *The knowledge base in educational administration* (1995) edited by Donmoyer, Imber, and Scheurich, 20 chapter authors (some of whom are authors in the handbook or are cited here) presented thoughtful and often introspective views on where educational administration/leadership was headed. Not all of the authors were optimistic that the field would have a scholarly future. We believe it fair to say that in 1995, the field of educational leadership was in the words of William Foster (1995), on a contested terrain. We must thank William Foster for shaping these debates in his 1986 book Paradigms and promises: New approaches to educational administration. The title of our first chapter here is an acknowledgement that we wish to uphold Foster's ideas that promises trump paradigms.

We also believe it is fair to ask as did a leading critic of the field of educational leadership, Fred Hess (1995), the unasked question, namely, "Should the discipline of educational administration be transforming itself or should it be going out of existence?" (p. 68)

But the debates on the knowledge base ignored other obvious questions, most frequently defining a "knowledge base" quite narrowly. For example, how is it that entire scholarly volumes in education, entire library shelves on diverse topics ranging from the needs of special children to counselor education, curriculum and instruction, multicultural education, etc. do not have one single citation from the field of educational leadership? Even the exemplary *Handbook in Social Justice in Education* edited by Ayers, Quinn, and Stovall (2009) omits any mention of school leadership. Leadership is not even in its index. Similarly the first edition of Springer's *International Handbook of Educational Leadership and Administration*, edited by Ken Leithwood in 1989, there was no mention whatsoever of social justice, although by 2002, the term does appear. In other words, peer-reviewed literatures which advance education's knowledge base are able to ignore entire fields of study and still call themselves comprehensive reviews of literature.

Another instructive historical treatment on the problems of education was written by Ellen Condliffe Lagemann (2000): An elusive science: The troubles of educational research. The book literally reads like a multigenerational family feud in the tradition of the Columbian epic novelist Gabriel Garcia Marquez, as it carefully documents how education defined itself professionally, as fields of specialization, in terms of research methodologies, theory(ies), and policymakers era by era. Each historical turn was characterized by its epistemological and methodological debates and subsequent struggles for power and recognition. In her own shorthand version, Condliffe Lagemann concluded that the disciples of Edward Thorndike's psychological test and measurement theories and methods won out over John Dewey's progressive, experimental, and experiential approach to education as a human science.

According to Reavis (1938), the use of statistical investigations in educational administration can be traced to Thorndike in the first decade of the twentieth century. Thorndike's work was instrumental in advancing statistical analyses of school problems.

> The influence of Thorndike … on educational administration was far-reaching. Superintendents began to employ statistical methods in the analysis of school facts. Their annual reports took on a new character. Statistical tables were presented showing the age-grade distribution of pupils, the percentage of failures and withdrawals by grades, and other pertinent findings. They quickly discovered that statistical analysis was essential to clear thinking when quantitative data had to be dealt with. With this method of investigation administrative officers could find a rational basis for policies in both organization and internal administration. Departments of education in universities developed courses of instruction in statistical methods for the training of administrative officers and technicians in this type of research. Professor Thorndike contributed a text on mental and social measurement for use in such courses. (p. 25)

Whether that justifies why and how testing regimes (e.g., PISA, TIMMS, NAEP) in public schools today focus more on a narrow informational knowledge base than on addressing the needs of the whole child, her/his families, and their communities are still matters for debate. But one consequence not at all debatable is that the enacted structures and knowledge base of schooling has maintained the privileges of certain citizens, specific disciplinary subjects, and specific research designs and methods over others that might be taught and studied more inclusively. These emphases on test and measurement dominated research in the field of education, including that of educational leadership. Moreover, the predominance of quantitative studies and statistical analyses in many countries illustrates its strong and continuing impact. The tightly closed circle of testing emphasizes statistical analyses as both practice and research over other types of research that seeks in-depth understanding of local school members and their communities often written off pejoratively as small sample case studies, local contexts, ethnographies, single subject designs, and other methods characterized as "non-empirical position papers" (see Donmoyer, Chap. 9 in this volume).

Although we have described this handbook as international, we recognize that educational administration and leadership are primarily a Western concept—one that has recently been gathering momentum in Eastern and in developing countries, even though several languages, including French and Spanish, have no specific term for "leadership." In the United States, it is likely fair to say that the aforementioned strong emphasis on empiricism, facts, data, and rationality by both school superintendents and by scholars influenced the development of the discipline of educational administration (now more often called educational leadership). This origin of educational administration as a discipline is often traced in the United States to what has become known as the Chicago School—named after a landmark meeting held in Chicago in 1957. Culbertson (1995) explains that "more than fifty professors from twenty leading universities travelled by car, train, and plane to Chicago on November 10, 1957 to take part in a seminar" (p. 34) entitled Administrative Theory in Education. From this seminar, the influential movement that has become known as the "theory movement" in educational administration was born.

The concept of theory adopted at the time helps to explain what are still pervasive notions of decontextualized practices in educational leadership, quests for "best practice," and generalizable solutions, inside what we have described as strongly contextualized challenges and situations. From 1957 to this day, leadership studies, whether labeled administration, management, or supervision, periodically have been the subject of numerous handbooks, encyclopedia, and yearbooks. The majority of these have focused on administration, leadership, or policy narrowly defined, without examining how the broader educational subdisciplines could inform leadership practice.

It is interesting to note, however, that Culbertson documents how two centuries ago, Charles Payne, superintendent of schools in Adrian, Michigan, argued that

> Educational organizations are not "objective" phenomena regulated by general laws, rather they are mental constructs that reflect the perceptions and interpretations of their members. (Culbertson, 1995, p. 3)

Through his concept of educational organizations as mental constructs, Payne foreshadows Thomas Barr Greenfield's later rejection of positivistic views and calls for an understanding of educational administration that emphasized social theory, social practice, and values—all elements of leadership for social justice you will find in the chapters in this handbook.

Bridge Builders

In every generation, there have been progressive educational activists and researchers as well as those who serve to maintain the status quo. Within both camps, however, there have been and still are individuals whose research serves to build bridges to school improvement as well as to social and political progress: Brazil's education minister, Paulo Freire (1970), as a government official and as author/teacher in the *Pedagogy of the Oppressed*; Linda McNeil's (1986) research in Contradiction of Control; Henry Giroux's incorporation of cultural studies into both teacher education and educational leadership; Carolyn Shields (Chap. 19, in this volume) on transformative leaders; Jerry Starratt (Chap. 5) on why critique, care, and justice matter together; Dilys Schoorman (Chap. 13) who sees research and service as a scholarly commitment; and Christa Boske (Chap. 17) whose ideas from social work are translated into social justice leadership in education.

All of these educators and the other authors in this handbook are bridge builders who stand on the shoulders of other scholars like John Dewey, Alice Miel, William Foster, Richard Bates, and Catherine Marshall.

By 2006, the increasing number of books, articles, and programs dedicated to promoting social justice led Catherine Marshall and Michelle Young, the Executive Director of UCEA (in Marshall & Oliva, 2006), to write the following "bold assertion":

> … individuals who are unable or unwilling to purposefully, knowledgeably and courageously work for social justice in education should not be given the privilege of working as a school or district leader. (p. 308)

In some ways, this assertion sums up the underlying message of this handbook. We believe educational leadership and social justice are, and must be, inextricably interconnected. While this bold assertion is more rhetoric than reality, it clearly opens the way for researcher-advocates of social justice to build both research and action agendas in the ongoing struggles for making this bold argument a reality. The struggles will likely be unending as we move from studying issues of diversity, literacy, equity, democracy, and specific injustices to actions based on social justice, not as a singular construct but rather as socially constructed ideas designed to fit and address local and national problems in and out of schools and universities. Indeed, it may take years to see the fruits of our labors, yet we must persevere.

The challenge facing educational leaders in every nation-state in the world is to reprioritize leadership practices so as to address the pragmatic need to successfully lead schools, school systems, and universities effectively and efficiently while, at the same time, to ensure, despite the business of their lives, that they address the difficult challenges posed by social, political, and economic realities, by issues of disparity, poverty, oppression, conflict, and prejudice, and by inappropriate uses of power. We agree with Mick Dodson, then Aboriginal and Torres Strait Islander Social Justice Commissioner, as cited in Fredericks, Maynor, White, English, and Ehrich (Chap. 39 in this volume):

> Social justice is what faces you in the morning. It is awakening in a house with adequate water supply, cooking facilities and sanitation. It is the ability to nourish your children and send them to school where their education not only equips them for employment but reinforces their knowledge and understanding of their cultural inheritance. It is the prospect of genuine employment and good health: a life of choices and opportunity, free from discrimination. (Dodson, 1993, p. 1)

And we also agree that holding difficult conversations has to be facilitated, nurtured, and sustained within schools. As educational leaders for social justice, how do we do this "without falling prey to the readily available formulae of school and curricular reform that – with all good intentions – seeks out simple causal explanations of school reform, renewal and improvement"? (Woods, Dooley, Luke, and Exley, Chap. 28). How do we do this conceptually, methodologically, as teacher-leaders and activists, as administrators, as professional developers, as policy advocates, as professors in higher education preparing the next generation? We read, we write, we teach, we make a difference. We hope you enjoy the first step here, reading.

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Part I

Conceptualizing Social Justice: More than a Definition

Chapter 2

The Place of "Social Justice" in the Field of Educational Administration: A Journals-Based Historical Overview of Emergent Area of Study

Izhar Oplatka

Since the establishment of educational administration (EA) as a field of study, it has been characterized by intellectual struggles and ferments as well as reflections on its nature, purposes, boundaries, methodologies, and knowledge base. The field's contents and research foci have consistently changed, and the field "lost" some topics while at the same time "adopting" new ones (Oplatka, 2010; Ribbins, 2006). This is strongly related to the lack of clear boundaries and cumulative knowledge base in the field (Donmoyer, Imber, & Scheurich, 1995).

The blurring of any field's boundaries is associated with research at the innovative frontier of fields and points of view and methods of related disciplines; permeation occurs across the span of discipline, from frontier to core (Klein, 1993). In other words, a field of knowledge is essentially open ended as there is never-ending proliferation of new disciplinary and subdisciplinary fields (Hoskin, 1993; Rodgers & Rodgers, 2000). The field of EA is no exception. It has extended boundaries, i.e., multiple paradigms and a tremendous variety of topics and subject areas published in the field's texts.

The purpose of this chapter, then, is to trace the place of "social justice" in the field's discourse since early 1960s, the decade in which the first academic journals of the field appeared. More specifically, the chapter aims at (1) presenting the emergence of "social justice" as an area of study in the field's journals from a historical perspective and (2) analyzing the major topics related to this area of study and its types of publication.

Historical analysis offers a new approach to understanding an area of study by charting according to date the main research contributions over a precisely defined period (Gray, 2001). Likewise, it allows some meta-epistemological reflection of a relatively new area of study and, as Humes and Bryce (2001) noted, tries to make

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the field "more cumulative in character" (p. 342). Thus, this chapter is intended to enable scholars to grasp the unique development of "social justice" in the field of EA and make sense of its theoretical and applied knowledge cumulatively and systematically.

Likewise, the decision to base this overview on journal articles emanated from the assumption that academic journals are an arena where dialogue about knowledge production and the nature of the field takes place (Gunter, 2002), as well as reflecting and defining lines of inquiry developed by those in the field (Thomas, 2010).

The rest of this chapter is organized as follows: the first section displays the literatures on academic disciplines and their growth and on EA as a field of study. Then, it goes on to discuss the methodology I used to analyze the journal articles. The third section, the major part of this chapter provides an historical analysis of "social justice" in the field's journals in each of the last five decades. Some concluding comments end this chapter.

The Fragmentation of the Academic Discipline

Most of the knowledge production processes take place in university-based disciplines that perform the essential function of systematizing, regulating, and unifying the flow of social and technical practices at the heart of knowledge production, employment structures, and training programs (Lenoir, 1993) and are commonly assumed to be an inevitable part of the professionalization of scientific work (Whitley, 1983).

Disciplines have recognizable identities, demarcated areas of academic territory, and particular cultural attributes, underpinned by common norms of enquiry, familiar educational training, and shared rules of function and technical procedure (Becher, 1989; Bridges, 2006; Lenoir, 1993). They are distinguished by scholarly boundaries required by the nature of knowledge itself and intensified by unique methodologies and conjectures that are not translatable into those of any other discipline (Hausman, 1979).

Most members of a given discipline engage in the practice of differentiation (boundary-work) and, through it, recognize just who they are and what they do (Lenoir, 1993). This practice refers to a set of differentiating activities that attribute selected characteristics of particular branches of knowledge on the basis of differing methods, values, citation procedures, and styles of organization (Whitley, 1984).

Despite many efforts invested in disciplinary boundary-work, a process of permeation is widely evident, making boundaries ambiguous, flexible, historically changing, contextually variable, internally inconsistent, and sometimes disputed (Klein, 1993). One result of this process is the proliferation of subfields that tend to weaken disciplinary control and fragment cognitive structures. The discipline is highly differentiated into relatively autonomous subunits and methods that provide specialist identities, goals, and techniques (Whitley, 1983) and establish new connections with other disciplines (Hausman, 1979).

Several factors are attributed to the fragmentation and the boundaryless nature of many disciplines in our era, among them the massive increase in the number of university researchers resulting in a proliferation of competing theoretical systems and research topics (Whitley, 1983), influences of related disciplines' paradigms and methods (Klein, 1993), and the fragmentation and dislocation of social institutions in the postmodern society (Henkel, 2005).

The fragmentation process is more appropriate to applied fields, such as education, that draw on soft, applied knowledge as a means of understanding the complexity of human endeavors with the intention of enhancing the quality of personal and social life (Becher, 1989). Inherent in these fields is what Knudsen (2003) called "the fragmentation trap" characterized by a search for new theories coming to prevail upon the activity of extending and elaborating a research program. This "trap" is likely to emerge in fields with too much conceptual pluralism embedded with many new theories and models proposed at too fast a pace in order for the scientific community to be able to evaluate each contribution properly and to integrate them into a reasonable coherent knowledge structure.

Related to the above is the great extent of permeation that characterizes soft applied fields. New ideas and streams of research penetrate the field and change its foci along its intellectual history. As a soft science, EA is no exception, and its history is replete with the permeation of new areas of study and the demise of others.

The Dynamic Nature of the Field of EA

Historical accounts of the field have seen the last quarter of the nineteenth century as the beginning of EA as a profession and later on as a field of study in universities in the USA. The rapid growth of school districts coupled with the search for efficiency in education spurred the development of EA preparations in higher education institutions, intended to prepare the growing number of principals/school head-candidates in USA for their impending role (Callahan, 1962).

Two new interconnected "ideologies" heading the social and professional discourses of both education and management had much influence upon the field's construction in the early 1900s. The first, borrowed from Taylor's principles of scientific management, highlighted concepts such as efficiency and effectiveness in the workplace. Excellence in EA was related to know exactly what you want the subordinates to do, the incorporation of modern business methods into preparation programs, and to the idea that EA is a profession distinct from teaching.

The second "ideology," grounded in the glorification of the modern science, stressed the need for a scientific approach to school administration in order to understand the art of running school systems and schools (Culbertson, 1988). Founders of EA were convinced that science was the basis upon which a new generation of school leaders could be developed (English, 2003), although the scope of their inquiry, as Culbertson noted, was as broad as civilization, past and present.

In light of paradigmatic shifts in organization studies, scientific management, with its stress on impersonal authority, was replaced by many field members in the human relations perspective that stressed personal interaction and was viewed as the counter-thesis of the second era. Above all, however, a pragmatic view dominated the field in those years (Culbertson, 1988). EA was substantially oriented to normative concerns, taught by senior educators (superintendents, senior principals) who had retired and delivered their practical knowledge and wisdom to prospective administrators. This was to be replaced by positivistic views of science, penetrating into the field by what is usually called "the theory movement." Science had to re-lead the scholarship of EA for several decades, and concepts such as objectivity, reliability, and validity had dominated the field's discourse.

It was only during the 1970s that what is usually called in the field's textbooks as "the Greenfield revolution" allowed the expansion of the field to combine multiple perspectives of knowledge production in its knowledge base. Knowledge production was no longer limited to robust scientific quantitative methodologies or "pure" scientific perspectives. In contrast, more and more qualitative reports, grounded in varied methodological and theoretical perspectives, have appeared in the field's knowledge base. Thus, a task force appointed in early 1990s by the UCEA (University Council of Educational Administration) identified seven areas that constitute essential knowledge for EA: social and cultural influences on schooling, teaching and learning processes, organizational studies, leadership and management processes, policy and political studies, legal and ethical dimensions of schooling, and economic and financial dimensions of schooling (Hoy, 1994).

The field's contents and research foci have consistently changed since its foundation, and it "lost" some topics (e.g., classroom management) while at the same time "adopting" new ones. Review of the field's knowledge base conducted during the last 40 years enables us to gain some impression of the field's wealth of areas of interest and theoretical perspectives. Campbell (1979), for instance, found that the topics of articles published in the US journal, Educational Administration Quarterly (EAQ), from 1965 to 1978 most mentioned were as follows: politics-policymaking, school finance, decision-making, motivation-satisfaction, preparation programs, leadership, administrative behavior, authority-bureaucracy, collective bargaining, and organizational structure. In 1990, Swafford analyzed the papers published during the first 25 years of the Australian Journal of Educational Administration (JEA) and found a wide variety of topics such as organizational structure, the principalship, leadership, organizational climate, politics of education, and change and innovation.

A host of research topics were found also in the field's conferences. For example, the conference of the British Society of EA (BELMAS) was replete with presentations in areas such as educational change and improvement, career issues, partnership, leadership and collaboration, leaders' attitudes, leadership development, and headship (Oplatka, 2008). A similar trend was observed also in the conferences of the Commonwealth Council for EA (CCEAM) (Oplatka, 2009).

The corollary, then, is of extended boundaries, i.e., multiple paradigms and a tremendous variety of topics and subject areas published in the field's texts. While some areas of study have consistently received much attention in the field throughout the years, others appeared in the field for a short period of time and faded. For the purpose of this chapter, I am interested in understanding the place of “social justice” and related concepts in the field’s knowledge base. In the next pages, I elaborate on the methods I used to feed my curiosity.

The Reviewing Method

The primary methodology I employed to trace the place of “social justice” in the field’s journals was qualitative content analysis (QCA) because a journal paper is seen as a document susceptible to textual analysis (Altheide, 1996). QCA combines both quantitative and qualitative content analysis. It involves collecting numerical and narrative data, i.e., the emphasis is on simultaneously obtaining categorical and unique data for every text studied.

Thus, QCA provides a way of obtaining data to measure the frequency and extent of messages following a serial progression of category construction-sampling-data collection and coding. It is the reflexive and highly interactive nature of the investigator, concepts, data collection, and analysis that is unique in this method. Besides providing numerical information, it is important to expose the reader to descriptive, interpretive information, thereby illustrating the usefulness of constant comparison for discovering emergent patterns, emphases, and themes in an analysis of documents and texts. Likewise, QCA enables researchers to refer not only to categories and variables that initially guide the study but also to others which emerge throughout the study, including the use of constant comparison of relevant textual parts, image, meanings, and nuances (Glaser & Strauss, 1967).

Sample

For this chapter, I reviewed the abstract of papers about “social justice” published between 1962 and 2010 in seven dominant refereed journals in the area of EA – *Journal of Educational Administration* (JEA), *International Journal of Leadership in Education* (IJLE), *International Journal of Educational Management* (IJEM), *Educational Administration Quarterly* (EAQ), *Leadership and Policy in School* (LPS), *Educational Management*, *Administration & Leadership* (EMAL), and *School Leadership & Management* (SLM). While the three first journals are more internationally oriented, the next four others are more nationally focused (USA and the UK, respectively), which, in turn, allow ample comparison among countries.

Only papers focusing on “social justice” were chosen for this review. Their identification was based on two criteria: (1) the terms “social justice,” “diversity,” “gender,” “sex,” “equity,” “equality,” “moral,” or “racism” or their adjectives appear in their abstract, and (2) the abstract contains some reference to issues of leadership and/or education explicitly and implicitly.

The Method of Analysis

The analysis was organized around two central issues: the topics addressed in every paper and the type of work (i.e., empirical, scholarly). Each paper was coded on four variables: topic, type of paper (empirical, comment, conceptual, etc.), subjects and methodology (if available), and the number of occurrences of the emergent categories was counted. A similar procedure has been commonly used in the field's reviews (e.g., Murphy et al., 2007; Oplatka, 2007).

Note, this analysis was not conducted by someone from an Anglo-American nation (I live and work in Israel and English is my second language). This position made me "remote" in some sense from the contextual and cultural determinants that influenced the authors of many of the reviewed papers, on one hand, and allowed me to connect many of the insights/findings to an international audience.

The 1960s and the 1970s: No Signs for "Social Justice"

In 1962, the first academic journal of the field, JEA, has been founded in Australia, and a year later the American academic journal, EAQ, appeared. The British journal – EMAL – published its first volume in 1972. Their appearance symbolizes the academization of the field, its boundary-work and scholarly identity-building. This process occurred in a time of a growing distrust of social institution, an increasing federal funding for administrator training programs, and the dominance of the welfare state ideology in many Western countries.

The field's discourse was still dominated by notions of "pure" positivist science and robust methodologies put forward by advocates of the "theory movement," although the "Greenfield revolution" during mid-1970s set the stage for impending shifts in this dominance and in its implications for the penetration of new spirits and ideas in the field (for more information about this developmental phase in the field, see Oplatka (2010)). Yet, in the first two decades of the field's academic journals, the study of leadership revolved around narrow aspects, such as leader-follower relations, leadership behavior, and the role description of some school leaders, all of which areas of study that were widespread in the business literature of this time. Evidently, a search for "justice," "diversity," and "racism" in the journals of those years found no papers using these terms in their abstracts. Educational leadership and social issues have simply not been juxtaposed in these two decades.

It is not to say, however, that "social" issues have not been referred to in the field's journals. A thorough reading of the abstracts reveals some reference to equality, educational opportunities, democratic leadership, and even gender, albeit this attention seems to be connected, only partially, to educational leadership (except the topic of democratic leadership). Many of the publications in these topics, grounded in sociology, have been published in the field's journals regardless of their relevance to principalship, management, or leadership. I elaborate on this issue in the next paragraphs.

One should bear in mind that the first professors of EA came from the social science disciplines, and chiefly from sociology. They brought with them concepts and theories developed out of the educational system. Yet, although many of them "moved" from studying "pure" sociological areas of study to pondering "educational" issues, few seem to have remained "committed" to their basic discipline and continued focusing on issues of discrimination, social equality, integration, and so on.

Apart from very few papers that focused on political socialization of students or determinants of aspiration in secondary school students, admittedly, the kind of work we no longer expect to read in the field's journal nowadays, some works analyzed the concept of inequality from multiple points of view. But, the focus was not on educational leaders or teachers but on the nation or the students. For example, authors illuminated federal interventions to achieve equity and overcome disparities among students, or discussed the influence of increasing public tuition in higher education on equity. Illustrative of this stream of scholarly work is Guthrie et al.'s (1970) paper:

> The authors contend that children from lower socio-economic status homes are systematically discriminated against in the delivery of school services. Data from Michigan are employed to demonstrate that state aid equalization arrangements not only do not alleviate this discrimination, but, in fact, actually tend to reinforce it.

Clearly, the topics indicated above remind us that major concerns addressed by sociologists of education are entirely unrelated to issues of educational leadership and management. This characterizes also papers that considered tuition fee discrimination, educational opportunities for students in African countries, social stratification and the role of State Departments of Education, and social integration in state legislation.

For the readers of the field's journals during the 1960s and the 1970s, then, issues of segregation, diversity, inequality, social injustice, pluralism, racist discrimination, and desegregation were not alien. Yet, EA readers could be exposed to these topics also in journals of sociology of education which means that the field's journal had not necessarily added new perspectives to the major streams of thought in sociology.

Leadership for social justice, as we will see in the analysis of this concept in later decades, is related conceptually by some scholars to democratic values. In the 1960s and the 1970s, democratic leadership received most attention within the papers about leadership, as EA scholars pondered the application of democratic leadership in schools (e.g., Catholic schools), contrasted bureaucratic and democratic basic principles, and analyzed participative decision-making. Broadly, advocates of democratic leadership have emphasized its positive consequences for staff moral, ethical judgments, and low levels of staff disillusion.

Likewise, democratic leadership (and shared decision-making) was studied from rational-organizational perspectives whose main goals were to improve the school's efficiency and effectiveness by proposing contingent models of leadership or examining the effects of shared decision-making on varied dependent variables.

Put differently, participative decision-making or democratic leadership were means to achieve the school's aims, not a moral engagement for its own sake.

Perhaps, the seeds of an impending change were, however, planted in these decades in the form of a small number of papers that have inculcated the gender concept into the field's discourse. Be it a study of decision congruence and the gender of school administrators, the executive role of women in New Zealand education, for example, a comparison of female and male professors on participation in decision-making, or public prejudice against women school administrators, this new stream of research symbolizes the awareness of some field members of the weakness of "pure" rational models which were based on white men in different roles. EA (both in schools and HE institutions) was no longer parallel to white male-based cultural scripts and arrangement solely. Women were there too.

The 1980s: The Appearance of "Leadership" and "Gender"

In 1980s, the phenomenon of school leadership had penetrated into the field's discourse beyond the model of "democratic leadership." Articles using the word "leadership" in their title began to appear, stressing the role of school leaders in the lives of teachers and pupils and presenting models and views of leadership imported from cognitive or practical points of view. They were accompanied by a few works devoted to studying the potential impact of leadership upon varied teachers' perceptions and behaviors and studied that examined the relation between leaders' styles and varied variables (e.g., teacher morale, administrative authority).

But it was the model of instructional leadership that caught the attention of several scholars, i.e., the ways by which school leaders develop and maintain instructional activities, rather than the moral aspects of leadership. Only one conceptual paper out of the hundreds published during the 1980s in the field's journals referred to moral aspects of educational leadership. William Greenfield, an American EA scholar, wrote in 1985 about the moral socialization of school administrators:

> The study of administrator preparation programs, processes, and associated outcomes has proceeded in a theoretical vacuum, and has focused primarily on technical knowledge and skill associated with the school administrator's role. This article presents a theoretical framework for the study of preparation practices and outcomes, and discusses the moral socialization of school administrators, a neglected but critical dimension of administrator preparation.

This neglected dimension had to wait for the 1990s to be "revealed" in the field. Meanwhile, readers of the field's journals in the 1980s were now reading about issues of equality, equity, desegregation, equal of opportunity, and other "sociological" issues in separation from leadership. Book reviews published in the English journal – EMAL – presented sociological writings about "educational policy and educational inequality," "the redefinition of equality of opportunity," or "educational disadvantage." One paper, written by Fisher in 1987, an English scholar, linked principal preparation programs and cultural diversity within schools:

> Two major approaches to manager development in schools are identified. The first provides a tool kit for purposive action; the second is aimed at helping managers cope with the pressures and dilemmas of the job. The need for the sharing and coping style of manager development is traced to the cultural diversity that can exist within schools…A framework of manager development which tries to synthesize both approaches within a single perspective is developed.

Above all, however, “old” topics connected explicitly and implicitly to current conceptualizations of leadership for social justice – democratic leadership and gender – continued to be published in the field’s journals. But, by this time, EA readers were now being exposed to papers about racism and race. Scholars and researchers were still concerned, however, with issues of participative decision-making, the involvement of teachers and middle managers in managerial decisions, centralization of power within educational systems, and many other democracy-related topics. Democratic leadership was viewed positively, and its impact upon different aspects of school and schooling has been examined. In today’s terms, democracy was parallel to justice, equity, and care for teachers’ needs and concerns, although no author used these terms explicitly. Their time in the field’s discourse had not come yet.

In contrast, references to gender and feminist concepts have gradually but steadily increased in the field. But in the 1980s, EA authors were more focused on gender differences in EA, women in managerial positions, and women’s career in education. They acknowledged the need to explore women’s career distinctively from that of men and conceptualized their career in new, alternative terms, i.e., resisted the masculine nature of many theories, models, and studies in EA. Thus, we find papers about the career paths of female school heads in England, men and women’s access to superintendency, gender differences in teachers’ preferences for primary school leadership, role perceptions of deputy heads, and so on.

Yet, what seems to be most relevant to our discussion of leadership for social justice are works emphasizing the gender gap in EA, gender barriers to leadership position in education, androcentric bias in EA, sexism in principal preparation programs, and sex stereotypes in schools. Two works from that time illustrate this kind of works. The first, written in 1981 by Stockard and Kempner, deals with women’s representation in school administration:

> Earlier studies have noted sex discrimination in professional inter actions, graduate school enrolments, and hiring in school administration. The results of this study indicate some changes in these areas. There has been an increase in women’s representation on the programs of a state, but not the national, meetings of administrators; an increase in women’s representation in educational administration graduate programs, and an increase in women’s representation in administrative jobs. However, women graduate students are more often in degree rather than credential programs, and women administrators are more often in low-level as opposed to high-level positions....

The second work, written also by American researchers, Frasher and Frasher (1980), focused on sex bias in the evaluation of administrators:

> Using a set of in-basket materials that suggest specific leadership styles, 135 graduate students in educational administration evaluated hypothetical superintendents who

> were depicted as female or male and rule bound or flexible. Overall, the fictitious female superintendent was rated as less fair and less flexible than her male counterpart…When these results were viewed in the context of a body of literature that shows women administrators to be fully as effective as men and in the context of the small number of women in educational leadership positions, they strongly suggest that sex bias has operated to the disadvantage of women and the education profession.

These and related works symbolize, in my view, the initial acknowledgment of EA researchers in the irrational nature of EA and the need to analyze it from multiple perspectives, including gender. Put another way, by "discovering" the gender influence upon educational leadership, field members seem to have opened the gate for broader views of EA, in that it is not necessarily been conceptualized in terms of masculine terms (e.g., middle-class white men for middle-class white children, technical competencies) but rather as an holistic phenomenon of varied dimensions.

In this sense, during the second part of the 1980s, we observe three works that refer, even indirectly, to issues of race and racism. Thus, authors reviewed the research on equity and minorities and women in EA, explored Hispanic Apartheid in American public education, and analyzed the history and ideology of the Education Reform Act in England to understand its threat to antiracist initiatives. Although, these works are not related explicitly to educational leadership, they signal new waves of intellectual thoughts in the field.

The 1990: Initial Debates About Leadership and Social Issues

Education caught the national political attention in the 1990s as it never had before in many Western countries, as more and more right-wing governments adopted neoliberal policies of privatization, accountability, and marketization in order to "save" the country's education and raise students' academic achievements (Weiner, 2000). This policy change had much influence upon the discourse of EA as a field of study. It is evident that more EA scholars than in previous decades had begun to study issues of morality, social justice, social diversity, equality, and racism in relation to the school, in general, and to educational leadership, in particular.

Before I extend the debate on these new streams of study, some comparisons to preceding decades are warranted to better understand the scholarly breakthroughs during the 1990s. As noted above, during the three decades since the foundation of the first journals in the field, these journals were an outlet for works grounded in sociology of education. This yielded concomitantly research reports and book reviews about equity, equality, and equal opportunities in education regardless of EA or leadership, a kind of writings that decreased considerably in the 1990s. In this decade, there are very few works that associated between these concepts and education policy, reforms, schooling, and even principal preparation programs. For instance, Perry (1997) aimed at identifying stakeholders' attitudes regarding the effectiveness of school in providing intellectually challenging environments for a diverse population and provided recommendations for improving educational leadership training to include strategies dealing with issues of equity and inclusion. Another example comes from the work of Fowler (1995) who analyzed the neoliberal value shift and its implications for federal education policy in the USA. She wrote:

> With Clinton's election to the presidency, the neoliberal wing of the Democratic party came to power. This change has important implications for education policy. This study, based on a content analysis of neoliberal political communication, concludes that the policy values most emphasized by neoliberals are economic growth and community. Equity, with a focus on class issues, is also an important neoliberal value. An analysis of the Clinton administration's education policy in 1993 and early 1994 suggests that it generally reflects these neoliberal values. This represents a shift away from both the recent conservative emphasis on efficiency and liberty and the earlier emphasis on equality which characterized the liberalism of the 1960s and early 1970s.

EA researchers continued to study and write about participative leadership (what used to be "democratic leadership"). But, while the vast majority of authors interested in this form of leadership continued writing about topics of participative decision-making, shared governance of schools, teacher involvement in school management, collegial management of schools, and management teams, one paper that called for the preparation of school principals for ethno-democratic leadership merits highlighting. Maxcy (1998) claimed that because school leadership nearly always operates within a multicultural setting and complex social dynamic, "we must relocate race and culture to the heart of democracy, embracing a new vision of democracy as a personal-social way of living…." In doing so, he illuminated the association between race and democracy, a new understanding of democratic leadership in that time.

Along the same lines, whereas researchers (mostly women) increased their interest in understanding gender differences in teaching and principalship in the 1990s, very few of them (mostly in the USA) began focusing on gender or feminist issues not only separately but rather in relation to cultural diversity and race. Cultural diversity, for example, was explored through the lens of an African-American feminism, and "race" was juxtaposed with gender, equality, and class. Young, Place, Rinehart, Jury, and Baits's (1997) paper exemplifies this new stream of research:

> Race (Black and White) and sex of applicants and of organizational representatives were systematically manipulated to produce demographically similar and dissimilar pairings. Vacancy characteristics associated with teacher positions were manipulated through recruitment messages…Contents of recruitment messages were found to interact with sex of an organizational representative and race of an applicant. Black applicants preferred female organizational representatives presenting recruitment messages emphasizing either work environment attributes or work itself attributes. White applicants preferred male organizational representatives presenting recruitment messages stressing only work environment attributes.

Note, however, that "social injustice" was referred, by and large, to sex discrimination (e.g., salary discrimination, unequal career advancement) or gender inequality, i.e., the focus of most gender-oriented studies was on women regardless of their race, class, or social position.

But, for a new group of researchers, issues of social justice and moral engagements deserved a particular attention through the construction of moral leadership.

In their view, the antitype of the technical, rational models of educational leadership was the educational leader whose main concerns are not only student achievement and measurement. This kind of leader has been conceptualized in terms of ethical reasoning, moral responsibility, value system, justice, care, and authenticity. The "moral" ferment in the field came in the form of scholarly and empirical papers published in the field's journals as well as in a special reports published in the British journal (EMAL) in 1993 on the work of Christopher Hodgkinson (the moral art of educational leadership). Two scholarly works published in two different journals and in a time space of 5 years seem to have brought the news of the moral revolution in educational leadership:

> With the demise of the empiricist theory of knowledge and the increased prominence of postempiricist and hermeneutical perspectives, it is clear that various aspects of our social lives – including educational leadership – should no longer be thought of in terms of technological or instrumental rationality and technical expertise. Although the current philosophical ferment allows for different ways to rethink leadership, this article examines the implications of one school of thought – philosophical hermeneutics – for the research on, and especially the practice of, educational leadership. The central point is that this perspective, when interpreted in terms of how we think of ourselves as persons, results in a conceptualisation of leadership as a predominantly practical and moral activity. (Smith & Blase, 1991)

> Are 'scientific' theories of educational management compatible with the goals of an education service whose local and individual beneficiaries enjoy autonomy? Recent theories of educational administration are discussed, with particular attention to their implications for social justice and educational diversity. Examples from the work of Elster and others in social-choice theory are applied to problems of resourcing the curriculum and school organization. The potentially contradictory requirements of efficiency and equity raise difficult questions of professional accountability. Resolving them will require effective community participation and collaboration. (Strain, 1996)

Indeed, contemporary authors wrote extensively about how school members negotiate rather than reconcile the ethics of care and justice in actual practice, analyzed the ethical dimension of educational leadership, and connected leadership with authenticity, intentionality, spirituality, and sensibility. Catherine Marshall, one of the pioneers in this new area of study, further elaborated on the components of moral leadership in a paper published in 1996 (with Patterson, Rogers, and Steele). Based on their empirical works with career assistant principals in the USA, the authors suggested that the ethic of care may alternate traditional perspectives of EA.

For the purpose of this historical overview, three concepts need further highlighting – social justice, race, and diversity. While the two first concepts received limited attention in the field's journals during the 1990s, the third one caught the attention of many EA scholars in that decade. Thus, three papers included some reference to social justice or injustice in educational leadership, criticizing the leadership theory and research, claiming for the failure of traditional leadership models to create school systems that enact social justice, or exploring the implications of "scientific" theories of EA for social justice and educational diversity. One study, furthermore, examined Australian principals' attitudes toward inclusive education, a kind of education that is philosophy based, according to the authors, on social justice (Bailey & du Plessis, 1997).

Conversely, the five papers revolving around issues of racism and race elucidated scant, if any, reference to educational leadership. Researchers asked how far ethnic minority support staffs working in schools are treated as professionals; illustrated how school district's reform efforts replicated the unequal distribution of knowledge, power, and resources by race and class; analyzed critical race theories in feminist thoughts; or investigated the political and conceptual underpinnings of opportunity-to-learn standards among African-American students. Race was still observed in relation to reform, feminism, equality, and policy, and the part of practical implications for school leaders was marginal in these works.

Finally, the issue of social diversity has received more attention in the 1990s, as more scholars and researchers wrote about choice and diversity, inclusive schools, or school curriculum. For example, Canadian researchers (MacKinnon & Brown, 1994) reported on schools' attempts to accommodate students with widely diverse needs in regular classrooms, while Australian researchers (Stone & Harrold, 1990) concluded that any principals who are determined to adapt their schools' operations to better serve the educational needs of their students are, however, unlikely to be prevented by central, system-level directives. Yet, the paper that retrospectively seems to acknowledge and legitimate the permeation of social issues into the discourse of educational leadership and administration is a paper that displays an initiative to map the knowledge base in EA conducted by the University Council for EA in the USA. Lomotey (1995) summarized the main elements of this initiative:

> In 1994, the University Council for Educational Administration (UCEA) published the first part of its knowledge base in educational administration. The council set forth to establish 7 domain overviews, to compile key articles and bibliographies, and to create taxonomies and case studies. In the domain overview for social and cultural influences on schooling, the authors argue that (a) illegitimate forms of exclusion provide the foundation of the social and cultural influences on schools; (b) the focus needs to be on the creation of a true democracy; (c) schools are local national and public entities; and (d) efforts should be directed at alleviating the disenfranchisement of students in schools. Implications for practice include the fact that teacher and administrator training programs should pay closer attention to the failure to prepare educators to deal with diverse student bodies….

This report paved the way, I believe, to future works about context and leadership, in general, and about educational leadership and minority students or underprivileged communities, in particular. Issues of social justice, moral leadership, diversity, and race will penetrate into the field's discourse in a larger scope in the first decade of the third millennium.

The 2000s: The Era of Moral Leadership and Justice

A stark distinction between the 2000s and the previous decades in respect to the interest given in the field to issues of "social justice," "cultural diversity," and moral aspect of leadership is clearly observed. In this sense, readers of the field's journals in the last decade have witnessed a considerable increase in the publication of papers about moral leadership and leadership for social justice as never happened before in the field.

Of the 385 papers about leadership published in the field's journals during the 2000s, 81 handled issues of moral leadership, including leadership and social justice, race, and diversity. This was the leadership model that has received most attention during the first decade of the third millennium followed by 39 about participative leadership and 30 about the model of distributed leadership. The number of papers about instructional and transformational models of leadership was far behind.

Thus, field members from the four corners of the earth paid much attention to ethical aspects of educational leadership (e.g., defining the best interests of students, the ethic of care, ethical dilemmas in daily school practice), authentic leadership practices (e.g., the effects of structured self-reflection on the development of authentic leadership practices, leader authenticity in intercultural school contexts), and moral dimensions in EA (e.g., managerialism and moral disenchantment in education, moral and reflective constructs in leadership development programs, the factors of moral engagement in school). Two papers illustrate this stream of writing:

> This article proposes that effective leadership in intercultural schools requires authentic understanding and related action; and that this can only be sought through a dedication to ongoing leadership learning…The major theme running through related discussion is that authentic intercultural leadership is particularly attuned to the values, beliefs and behavioural uniqueness of the students, teachers and others which comprise the community. In other words, it aims to acquire intercultural understanding on an ongoing basis and use this to inform leadership beliefs and practice…. (Walker & Shuangye, 2007)

> This paper explores the moral and ethical dimension of indeterminacy in EA within the context of the managerialization of education. Drawing on Max Weber's seminal work on rationalization, disenchantment, and the ethic of responsibility and the ethic of conviction, the author discusses the conflict between accountability and educational autonomy. While this conflict constitutes a key dilemma of educational leadership, educational theorists all too often attempt to resolve the conflict in favor of accountability over commitment consistent with managerial principles. By contrast, it is argued that mature educational leadership is characterized by an appreciation that conflicting ethical orientations are irreconcilable and that sound educational policy and practice must reflect practical realities and demands without sacrificing educational ideals. (Samier, 2002)

The permeation of moral and ethical issues into the field's discourse has been "justified" as in the previous decade by the overemphasis given in the 2000s to technical aspects of educational leadership denoted by terms such as accountability, efficiency, and effectiveness. Special issues aimed at contrasting between Taylorite notions of scientific management and moral aspects of leadership and at putting forward the need to explore more thoroughly these and related aspects in EA, especially in our multicultural and diverse societies.

Their calls have been "responded" to by reviews of books about the management of values in school, the moral imperative of school leadership, ethical leadership and decision making in schools, a practical guide to moral and ethical school leadership, and moral literacy in school. A special issue in SLM from 2007 presented works from different countries about school leadership and equity in which researchers describe how schools respond to cultural diversity and changing demographics in their own country. Similarly, IJLE published a special issue in 2001 multiple perspectives on values and ethical leadership in education, publishing works such as Chinese culture and leadership and an Indian perspective on moral leadership in education.

To this point, the reader could notice the wide variety of concepts and dimensions underlying the new stream of thought, and study in that moral leadership is viewed from multiple perspectives and analyzed in relation to ethics, values, and system. For the purpose of this chapter, though, I elaborate on three major concepts – social justice, diversity, and race – three concepts that are tightly interconnected to each other and to the construction of moral leadership in the last decade.

Leadership for Social Justice

While the term "social justice" has appeared only rarely in 1990s, it appeared in 43 works published in the field's journals (including 5 published in *Journal of School Leadership*) a decade after, perhaps due to the foundation of new journals whose aims included the extension of our knowledge about educational leadership (IJLE, LPS). In 2002, a paper published in EMAL seems retrospectively to have sharpened the debate about social justice and educational leadership and set the stage for further investigations in this area:

> This paper provides a philosophical and methodological analysis which aims to support research on social justice in educational organizations. It traces a path from Thomas Greenfield's ethical formulations to the moral philosophy of Jurgen Habermas and does so in order to query the ethical implications of following Greenfield in imagining educational organizations as 'moral orders'. It argues that such a metaphor is problematic for guiding research with a social justice focus because it does not adequately conceive its own ethical basis, and thus cannot address (or redress) moral authority in organization. It claims that Greenfield's metaphor requires substantial revision, such that organizations are better regarded as moral communities…. (Milley, 2002)

Later writings discussed the interaction between social justice or injustice and educational leadership, by exploring the career and values of leaders who strive for social justice in their work, policy implications for social justice in school district consolidation, African-American leadership, and the struggle for social justice and successful leadership and by suggesting ways to prepare educational leaders to be committed to social justice and equity. A dramatic increase in the interest of field members in leadership and social justice is evident in the second part of the 2000s, as scholars wrote about inclusive education and its implications for social justice, the ways to promote social justice in school or superintendent perspectives and practice of social justice. Some reviewed the first books about leadership for social justice published by field members and debated the means by which this kind of leadership is used in practice.

But a large portion of the knowledge production about leadership and social justice came up in the form of special issues. In 2002, Margaret Grogan edited a special issue in JSL about leadership for social justice, the first special issue in this area.

This issue included articles about the tensions between the pluralism of postmodernist thinking and modernist notions of social justice that produce "predicaments" for school leaders (Blackmore, 2002) and a case study of a leader who fosters authentic participation for advancing social justice in an urban community center in Venezuela (Goldfarb & Grinberg, 2002). One paper proposed a framework for understanding the moral and political possibilities of educational leadership that contradicts between two educational leadership paths; the first illustrates how an educational leader continuously builds a just school community under changing demographic conditions, and the second illustrates how single-minded visions for a just school society emerge through the heroic efforts of individual leaders (Bogotch, 2002).

Two years later, Catherine Marshall edited a special issue of EAQ about social justice challenges to EA whose aim was to explore issues of cultural diversity, equity, and democracy. In one paper, critical pedagogy was used to analyze the discourse of social justice in the field of EA, while other papers offered practical models or guidelines for preparing school leaders committed to social justice and equity or helping current leaders leading for social justice (e.g., Brown, 2004).

Similarly, a special issue of JEA in 2006 focused almost entirely on the application of social justice perspective in leadership development programs. Scholars proposed a framework for preparing leaders for social justice, reported on a doctoral program intended to promote social justice leadership, and examined whether emerging school leaders are prepared to face the challenge posed by George Counts' classic 1932 speech in which he asked "dare the school build a new social order?" (e.g., Hoff, Yoder, & Hoff, 2006). At the same year, LPS published several papers, in which authors connected between inclusive leadership and social justice for schools, the politics and emotions of leading for social justice, and the story of the first African-American woman principal in New York City, as an example, according to Johnson (2006) for the need to analyze leadership for social justice in light of historical, political, and social contexts in which it is practices.

The final issue devoted to leadership for social justice was published in JEA in 2007, edited by Anthony Normore. This issue was composed of works from different parts of the world (e.g., England, Tonga, Hong Kong), thereby enabling the reader to be exposed to varied conceptualizations of social justice and their cultural and social determinants. Illustrative of this issue is Fua's paper about social justice and leadership conceptualizations from Tonga:

> This article aims to explore Tongan conceptualizations of social justice and leadership from a cultural perspective. The approach taken is from a cultural perspective based on evidence that culture influences our thinking and consequently our behaviors, and the argument that social justice is about recognizing our values, philosophies, processes and structures in our education system and that theorizing social justice should be founded on our knowledge systems that are embedded in our cultures. By conceptualizing social justice from a cultural perspective, an alternative understanding is brought forward and a more global perspective is evident.

Notably, the different journals have published papers proposing conceptualizations of leadership for social justice, illuminating the connection between this type of leadership and leadership development programs, and emphasizing the need to conceptualize educational leadership in terms of social justice in our era of accountability and efficiency in education. This topic represents, in my view, the incipient stages of epistemological development in which the debate about leadership for social justice is positioned and, in turn, the need to gain academic legitimacy for its permeation into the field's discourse.

Cultural Diversity

Eighteen papers referred to cultural diversity in their analysis of educational leadership, a term that has supplanted sociological terms such as equity and equal opportunity used in the past. Researchers examined leadership in inclusive schools; deconstructed cultural, religious, and ethnic diversity discourses in the field of EA; or offered insights into developing school leadership to engage with wider diversity in complex multicultural schools. An example of the research on diversity is Lumby's (2006) study:

> This article uses the theoretical framework of broad and narrow ways of conceptualizing diversity, the latter focusing primarily on those characteristics that are likely to lead to disadvantage, ethnicity, gender and disability, and the broader encompassing many more characteristics of 'difference', such as educational background, leadership style. It analyses evidence from 10 organizations in the Learning and Skills Sector in England…Their orientation coverts 'managing diversity', derived from human resources theory, from its intended aim of increasing equity, to a conceptual sleight of hand for sidestepping uncomfortable issues. Staffs are shown both to create an 'other' than the norm, an 'outgroup' particularly in relation to black and ethnic minority potential leaders, and to homogenize those who have entered leadership to delete any 'other'.

Much reference has been elucidated to construct models of leadership in intercultural contexts and, in turn, to produce knowledge that "acknowledges" the existence of unprivileged indigenous and ethnic groups suffering from alienation, exclusion, and disadvantage in the modern society. Scholars pondered on the ways by which educational leaders ought to or could facilitate access to schools for all children, the means to increase principal-candidates' awareness of diversity; considered the impact of a curriculum focused on issues of gender and diversity on leadership development programs; or examined European-American and African-American administrators' responses to intergroup conflict arising from cultural incongruities in desegregated suburban US schools, as did Mabokela and Madsen (2005). Others wrote critical essays about the Western ethnocentric notions of leadership and suggested new frameworks to analyze school leadership. For example, Shields, Larocque, and Oberg (2002) hoped "to model the type of debate that might occur in schools to help educational leaders better understand how to creat a sense of community in multicultural contexts" (p. 116). In these essays, then, diversity has been juxtaposed with gender, equality, equity, social justice, and race. The last concept came to the fore in the field's discourse more than ever before.

Race and Racism

Nineteen papers focused on inequality by race, principals and racism, and the lives and career of African-American male and female principals from a race theory. Very few attempted to summon scholars in the essentials of critical race theory to analyze race as an issue in educational leadership and schooling. Note, however, that race issues have not been written in light of educational leadership only but rather in relation to many aspects, including accountability, school culture, educational change, and education policy.

But, for the purpose of this historical overview, two topics merit highlighting. First, some papers focused on the school leader and his/her attitudes toward race and racism. For example, Evans (2007) examined the ways in which school leaders defined and made sense of issues of race and demographic change in their school, and Rusch and Horsford (2009) mulled over the dispositions and skills educational leaders need to break the silence and engage in constructive talk about race across color lines. Similarly, others called for intensifying the discourse of race equality in leadership development programs, or provided evidence of women principal living and working in ethnic minority groups (e.g., Hispanic, indigenous New Zealanders). Young and Brooks (2008) represented the attempts that had been made by field members during the last decade to promote ethnic equality and race awareness in leadership development programs, attempts that have been observed also in respect to social justice and cultural diversity:

> The purpose of this study was to identify strategies that faculty members and institutions employ to support graduate students of color. The authors were also interested in understanding challenges that face individuals and institutions as they seek to provide such support. Findings suggested that effective support for graduate students of color in EA preparation programs entails proactive yet thoughtful, individual, and institutional work in four areas: (a) recognizing and engaging issues of race in educational administration preparation programs, (b) effective and race-sensitive mentorship….

The second group of papers centered upon the career of the African-American administrator, who lives in single-race communities and attend single-race schools. The purposes of this writings were to broaden our theory of leadership to include the views of African-American practitioners, to investigate how race and race relations influence school leadership practice, to study superintendent search and selection practices in terms of equity for people of color, or to understand black female superintendents' persistence in their position. Two papers explored the career of Hispanic or Asian principals in the USA, a kind of population that might receive much interest in the field's journal during the next decade.

Concluding Comments

The history of "social justice" (including equality, race, diversity) can be depicted by a line on a graph that begins on the bottom of the left side and rises slowly but steadily up and up to the right side in the top of the graph. Indeed, the interest in “social justice” (and related social topics) moved from a very minor aspect in the field’s discourse, expressed mainly by sociological writings concerning issues of equality, equity, and equal opportunities regardless to educational leadership, to many studies and essays debating and researching forms of leadership for social justice and promoting the discourses of race, diversity, and equality in the field.

In the last decade, though, field members have only commenced to evoke some interest in understanding leadership for social justice that is an antitype for the sort of leadership advocated by neoliberal thoughts, i.e., the one that is preoccupied, almost entirely, with issues of accountability and achievements. Many authors seem to have set the stage for a more thorough debate in the components, factors, contexts, and outcomes of leadership for social justice. Yet, much work is needed to conceptualize this form of leadership and probe into its varied aspects and benefits for our multicultural society. This will probably be the task of scholars in the second decade of the third millennium.

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Chapter 3
"Creating Smooth Spaces in Striated Places": Toward a Global Theory for Examining Social Justice Leadership in Schools

Katherine Cumings Mansfield

The purpose of this chapter is to share an original social justice framework that emerged in conjunction with conducting a 2-year ethnography studying the culture of an urban all-girls' secondary school. I refer to this new interpretive lens as "Facilitating social justice by creating smooth spaces in striated places" or the striated-smooth construct. The meaning-making that occurred during and after the study did not follow a firm temporal chronology or emerge linearly within tidy categorical disciplines. Essentially, my pathway of learning was a porous and rhizomatic interlacing of past, present, and future – germinating from the intellectual, spiritual, and corporeal – scaffolding upon knowledge, faith, and lived experience. In short, this theory-building experience was more akin to dialogue between mind, soul, and body.

To convey my sensemaking, I first describe my readings of St. Pierre (2000) and the concepts of "striated" and "smooth" spaces. Then, the ancient spiritual words of Isaiah (c. 792 BCE) are explored and compared to the teachings of modern-day prophetic voices such as Martin Luther King, Jr. (Washington, 1986) and Mahatma Gandhi (Fischer, 1962). These constructs are then considered alongside the modern educational-philosophical works of Paulo Freire (1970) and Patti Lather (1991). Thereafter, I situate my empirical study as illustrating the new framework as well as show how the striated-smooth construct relates to prior theory. Finally, I explain how the striation-smooth construct goes beyond prior theory toward a new global theory for examining social justice leadership in schools that has potential to move the field forward as well as be applied to other societal contexts. Rather than "own"

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this theory of social justice and explicitly detail a list of "rules" one must follow, I offer this inspiration as just one conception of social justice that might be used to facilitate the creative thinking of others.

The Striated-Smooth Construct

Elizabeth A. St. Pierre (2000) wrote of her desire to study "how women construct their subjectivities within the limits and possibilities of the discourses and cultural practices that are available to them" (p. 260) and the importance of confronting "the constraining framework of one's past." To wit, St. Pierre emphasized the necessity of learning to what extent one is able to free oneself from the subjectivities embedded in one's history, thus enabling the self to "think differently" and form a new future (p. 260). St. Pierre highlighted the process of de-identifying with destructive subjectivities and the revolutionary re-identification that must occur when confronting the past and present in the attempts to build a new future. According to St. Pierre, this revolutionary process includes deep internal reflection that reveals knowing where you stand to enable one to judge where you are and thereby construct where you might rather be (p. 260).

Contemporary political discourse often engages two opposing arguments: the "pull yourself up by the bootstraps" mentality versus the notion that outside forces engulf our identities and mold us into something that we cannot control. Rather than entertain either argument, St. Pierre (2000) encouraged us to consider these apparent dichotomies as interacting energies. For instance, forces in specific places provide "especially fertile conditions, exquisitely dynamic intensities, that make us 'available' to a transformation of who we are, a contestation which compels us to rethink our selves, a reconfiguration of our 'place' and our 'ground'" (p. 260). In other words, there is a negotiation between internal and external – or there is reciprocal influence between self and place – and "if we wish to practice identity improvisation, attention to places may be required" (p. 260).

St. Pierre (2000) noted, through Game (1991), her interest in the "practices of space": Certain places make certain practices possible; consequently, certain places also close off opportunity (p. 261). She described how Deleuze and Guattari differentiated between striated space and smooth space (p. 263): Striated space is bordered and restricted where individuals might have innate determination, but their movement in striated space is defined in advance, and the relationship between person and space may be structurally impenetrable. Striated spaces place limitations on people and are often the result of centuries of prejudice (St. Pierre).

Within "smooth space," people's identities and roles as well as access to knowledge and other forms of social capital are not defined in advance but are constantly in flux. There are no binding patterns or fixed roles and identities in smooth space. While St. Pierre (2000) did not assert that smooth space is enough to "save us," she did affirm that smooth space allows more freedom for the individual to "deterritorialize" than striated space does.

Ancient Wisdom Poetry and Contemporary Mystic Activists

While contemplating what St. Pierre had to say, I was reminded of a phrase that has appeared in popular culture for almost 3,000 years:

> Every valley shall be exalted
> and every mountain and hill made low;
> The crooked straight,
> and the rough places plain.

The ancient words first appeared in the servant songs of Isaiah (c. 792 BCE) in the Hebrew Scriptures, were famously interpreted by Georg Friedrich Händel's 1742 production of the *Messiah* (Swafford, 1992), and subsequently used as a revolutionary call to action by modern-day prophet and civil rights leader, Dr. Martin Luther King, Jr. in the 1960s:

> I have a dream that my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character…I have a dream that one day *every valley shall be exalted, every hill and mountain shall be made low, the rough places shall be made plain, and the crooked places shall be made straight…* This is the faith that I go back to the South with. (Washington, 1986, p. 219, italics added)

In the memorable 1968 "I Have a Dream" speech, Dr. Martin Luther King, Jr. conjured the words of ancient writers as he pointed to the ways "the life of the Negro is still sadly crippled by the manacles of segregation and the chains of discrimination" (p. 217) and how "the Negro lives on a lonely island of poverty in the midst of a vast ocean of material prosperity" (p. 217). Dr. King was very cognizant of the existing striations that needed to be broken down and transformed into smooth spaces.

Mahatma Gandhi, born in India, was a contemporary of Dr. King, albeit his civil rights agenda started about a decade earlier in South Africa. Though both leaders and their followers maintained discourse, they were never able to complete a face-to-face meeting as they both so greatly desired (Fischer, 1962; Washington, 1986).

Like King, Gandhi's spirit was sensitive to the plight of people who had no voice; thus, he would not be satisfied until freedom and justice were accomplished for all people: "My soul refuses to be satisfied so long as it is a helpless witness of a single wrong or a single misery" (Fischer, 1962, p. 271). Gandhi added that he felt great responsibility to protect the least powerful from the most dominant: "I hold that the more helpless a creature, the more entitled it is to protection by [people] from the cruelty of [people]" (p. 52, more inclusive language added). Within this view from the margins, Gandhi was well aware of the geographic and social striations that existed for the African people he was working alongside:

> If you think of the vast size of Africa, the distance and natural obstacles separating its various parts, the scattered condition of its people and the terrible divisions among them, the task might well appear to be hopeless. But there is a charm which can overcome all these handicaps. The moment the slave resolves [to] no longer be a slave, [the] fetters fall. [The person frees oneself] and shows the way to others. (p. 282, more inclusive language added)

Again, akin to Isaiah millennia earlier, humanity's refrain speaks to the obstacles and restraints – the loneliness and isolation – of oppression. However, Gandhi was a great believer in the power of education to lift people to new thoughts, actions, and ways of being. Gandhi was able to use both his privilege *and* his minority status to speak to both sides of the conflicts in which he engaged. He emphasized to the colonists that those colonized loved their children, too, and had "the same dislike to have any slight upon them. [Furthermore,] there is no place on earth and no race, which is not capable of producing the finest types of humanity, given suitable opportunities and education" (p. 69).

Like King, Gandhi believed in a "spirit force" that could not be squelched. It took *both sides of the divide working together* to achieve the greatest good for all:

> I do not believe in the doctrine of the greatest good for the greatest number. It means in its nakedness that in order to achieve the supposed good of fifty-one per cent the interest of forty-nine per cent may be, or rather should be, sacrificed. It is a heartless doctrine and has done harm to humanity. The only real, dignified, human doctrine is the greatest good of all, and this can be achieved only by uttermost self-sacrifice. (p. 265)

Gandhi continued:

> The force of the spirit is ever progressive and endless. Its full expression makes it unconquerable in the world…What is more, that force resides in everybody, man, woman and child, irrespective of the color of the skin. Only in many it lies dormant, but it is capable of being awakened by judicious training. (p. 293)

Moreover, Gandhi emphasized the importance of those in a position of strength to constantly examine their labors on behalf of others:

> When you are in doubt, or when the self becomes too much with you, apply the following test. Recall the face of the poorest and the weakest [person] whom you may have seen, and ask yourself if the step you contemplate is going to be of any use to *[them]*. Will [they] gain anything by it? Will it restore [them]? Then you will find your doubts and self melting away. (p. 275, italics in original, more inclusive language added)

Contemporary Educational Activists

Further reflection on striated and smooth space channeled memories of Patti Lather's (1991) book, *Getting Smart*, wherein she stated: "given enabling conditions, every woman has something important to say about the disjunctures in her own life and the means necessary for change" (p. xviii). Lather wrote of "clearing out a semiotic space" by "challenging disciplines at the level of the basic categories and methods involved in the possibilities for knowledge" (p. 34). Lather's words are prescient of St. Pierre's notion of creating "smooth mental spaces" and "smooth textual space," making sense of our educations, religions, and other ways of knowing and learning. Important, for me, Lather's term of "clearing out" elicited a picture of strong women (Lather is a feminist after all) forging through thick brush, using effectual tools such as machetes, rather than a polite clearing of the tea set off the dining table. During the theory-building process, there was a constant cycling back and forth between

St. Pierre's work, the ancient servant songs, and contemporary activists. My reading of Lather's description of "clearing out" is reminiscent of Isaiah's ancient description of justice work as intense labor:

> I will break down gates of bronze
> And cut through bars of iron…
> …I will turn the darkness into light before them
> And make the rough places smooth.

Importantly, Lather (1991), like Gandhi before her, noted the difficulties in "speaking for others" or "doing for others." She promoted a "shift" in the role that "critical intellectuals" play, from "universalizing spokespersons to *cultural workers who do what they can* to *lift the barriers* which prevent people from speaking for themselves" (p. 47, italics added). Again, Lather's choice of words reflect the intense justice labor depicted in the servant songs of Isaiah as well as in St. Pierre's call for dismantling striated – and creating smooth – spaces.

Additionally, Lather (1991) spoke to the "politics of empowerment" and cautioned researchers to clarify what they meant by "empowerment." She found distasteful the notion that empowerment is "individual self-assertion, upward mobility and the psychological experience of feeling powerful" (p. 3). Instead, Lather defined empowerment as "analyzing ideas about the causes of powerlessness, recognizing systemic oppressive forces, and acting both individually and collectively to change the conditions of our lives" (p. 4). She added that "empowerment is a process one undertakes for oneself; it is not something done 'to' or 'for' someone…" (p. 4). In other words, while justice laborers may come alongside "others" as allies to craft the conditions necessary for change, they do not entertain the notion that they can somehow change a person or be prideful when change occurs. This type of "servant leadership" inherently requires an attitude of humility (Greenleaf, 2002).

Patti Lather's and other critical scholars' educational philosophy clearly follow Paulo Freire's (1970) earlier, seminal work, *Pedagogy of the Oppressed,* which reflected a similar approach: The "radical, committed to human liberation" does not consider oneself as a hero or liberator, but rather a servant that comes alongside the oppressed (p. 39). The struggle of liberation is found primarily in the educational processes that enable "the vocation of becoming more fully human" (p. 44). Collectively, people work to diminish barriers and create breathing space to accomplish full, human creativity and capacity. "Freedom is not an ideal located outside of [a person]; nor is it an idea which becomes a myth. It is rather the indispensable condition for the quest for human completion" (p. 47).

According to Freire (1970), oppressive conditions are those which one must criticize, reject, struggle against, and transform. Dismantling striations is a *laborious process* which is born when the oppressed "discover within themselves the yearning to be free" and the transformation of this yearning into reality through action. Freire even described liberation as an act *as painful as childbirth* in which the individual "emerges [as] a new person" (p. 49). But, in order for the oppressed to "wage the struggle for their liberation, they must perceive the reality of oppression not as a closed world from which there is no exit, but as a limiting situation which they can transform" (p. 49).

Striations and Smooth Spaces in Schools

The concepts of striated and smooth spaces are important to research on school cultures because schools often unintentionally perpetuate inequality in the ways they structure their organizations (Oakes, 2005; Oakes, Wells, Jones, & Datnow, 1997). As such, particular aspects of the school culture directly influence student outcomes in positive or negative ways (Garza, Reyes, & Trueba, 2004; Mansfield, 2011; Paredes Scribner, 1999; Valencia, 2002a; Valenzuela, 1999; Welton, 2011; Wyn & Wilson, 1997; Zigarelli, 1996).

For example, it is well known that organizations that configure curricular offerings based on tracking pupils more often than not deny minority students participation in gifted and talented (GT) programs and advanced placement (AP) coursework (Mansfield, 2011; Oakes, 2005; Oakes & Wells, 1998; Oakes et al., 1997; Southworth & Mickelson, 2007; Valencia, 2002a; Valencia & Suzuki, 2001; Welton, 2011). Research has indicated that opening up GT and AP opportunities to all interested students, and providing support systems such as mentoring and tutoring, facilitates academic excellence in elementary and secondary schooling and access to future higher education and career opportunities to students who otherwise would be locked out of these networks (Mansfield, 2011; Margolin, 1994; McKenzie & Scheurich, 2004; Oakes, 2005; Oakes & Wells, 1998; Oakes et al., 1997; Pallais & Turner, 2007; Southworth & Mickelson, 2007; Valencia, 2002b; Welton, 2011). The practice of tracking is just one illustration of an organizational striation that must be dismantled in schools, while providing supportive networks facilitates the development of smooth space.

In addition, aspects of the school culture (such as whether female students have an advocate from an adult school representative) often determine whether minority female students are able to penetrate upper-level math, science, and/or computer courses (Margolis & Fisher, 2002; Spears, 2008). An organizational culture that includes mentorship demonstrates smooth space by encouraging girls to take upper-level science, technology, engineering, and math (STEM) coursework, whereas the absence of such support could be considered a striation. While it is difficult to prove a direct cause-effect relationship between adult advocacy and student success, I propose the dismantling of striations and promotion of smooth space enables the conditions necessary to facilitate social justice in schools. Studies have shown that many teens – especially those negotiating a variety of identities such as socioeconomic status, race, and gender – need active adult encouragement and other interventions to view taking upper-level STEM coursework as means to achieve future goals of college and career and to improve educational outcomes overall (American Association of University Women [AAUW], 2002a, 2002b; Gilson, 2002; Kirst, 2007; Margolis & Fisher, 2002; Mickelson, 2003; Parker, 1997; Pipher, 1994; Sadker, 1999; Spears, 2008; Tyack & Hansot, 1992; Wyn & Wilson, 1997).

Finally, school leaders and teachers who endeavor to develop an organizational culture committed to developing high levels of trust between school personnel and families, as well as among relationships within the school, experience greater levels of parent participation, higher levels of student achievement, and enhanced teacher collegiality (Bryk & Schneider, 2002; Scribner, Young, & Pedroza, 1999;

Tschannen-Moran, 2004; Zigarelli, 1996). A principal and faculty implementing specific practices to develop trusting relationships at school is another example of creating smooth space in organizations. Ignoring this aspect of organizational culture can act as a striation because organizations that lack caring and/or elicit distrust often aid high teacher turnover and poor student attitudes among other difficulties (Bryk & Schneider, 2002; Deal & Peterson, 2009; Leithwood & Mascall, 2008; Scribner et al., 1999; Valenzuela, 1999; Zigarelli, 1996).

The Empirical Setting

The purpose of the original ethnography was to capture the story of the implementation of one major US city's first and only single-sex public school and the consequent shaping of the school culture according to its unique context (please, see Mansfield 2011; Mansfield, 2013a, b, in press for additional details). The secondary school Young Women's Leadership School (YWLS) is located in Southtown Independent School District (SISD) in one of ten largest urban centers in the USA and was founded to meet the specific needs of racial and ethnic minority girls living in lower economic circumstances. For decades, urban schools in the USA, Texas, and Southtown have struggled with racial and economic segregation and isolation such that inequality perpetuates throughout the preschool to postsecondary pipeline. In addition to a high incidence of teen pregnancy, a soaring dropout rate, and a leaky college pipeline of poor and minority students, SISD has continued to experience significant enrollment decreases as families relocate to the suburbs and exurbs.

Findings, collected over a 25-month period of ethnographic field work, substantiated the complex interface between historical, political, and sociocultural contexts; stakeholder decision making in the ethnographic present; and the enactment and negotiation school culture vis-à-vis the intersectionalities of student identities. A comprehensive literature review demonstrated student identities matter. Race, socioeconomic status, gender, sexuality, and other contextual factors are important considerations when probing educational access and achievement and the development of school cultures. Moreover, organizational elements matter. Educational leaders – their individual attributes and the cultures they create – are key to understanding and interrogating equitable practices in schools.

Archives and oral history interviews highlighted a variety of complex reasons local constituents favored the development of single-sex public options including a robust history of single-sex parochial schools in the region, a record of racial segregation of students of Mexican descent, acute enrollment decreases due to "white flight," and increases in teen pregnancy and dropout rates. Interviews with district administration indicated that the new single-sex magnet school helped them address a plethora of complex needs. The USDOE changes to Title IX were viewed as an invitation to establish single-sex schools and served as a means to repurpose empty school buildings, bolster enrollment, and curtail school closures. Additionally, supporters believed that female student outcomes would significantly improve as a result of the design and implementation of this all-female school. Interviews with parents revealed that families viewed the single-sex schooling options as a form of resistance whereby students and families could place identities such as race, class, and gender front and center to better negotiate future possibilities for their daughters. Taken as a whole, providing a single-sex public option was viewed by state and local stakeholders as a symbol of providing “the best” for their children.

Findings also showed that the teachers and leaders at the school were leading and laboring for equity and excellence in very specific material, intellectual, and emotional ways. While their inspiration emanated from a variety of sources, all were committed to making a difference for their students. Although their efforts did meet with some resistance, it was clear that the principal and teachers were committed to making this uncommon school exceptional for more reasons than merely being the first and only single-sex public school in a major urban center in Texas. Findings also indicated that the efforts of leadership and faculty did not go unnoticed by those their actions were meant to serve: parents and students. The girls and their families extolled the caring and sacrificial attitudes and actions of the teachers and building administration. Parents and students were able to iterate specific ways the professional staff was working to enact and negotiate a culture conducive to meeting the needs of students. The voices, taken together, describe a place devoted to learning and flourishing, a place where people respected each other, grew, and learned together. The story, in its entirety, described how leading for equity and excellence permeated all relationships inside the school.

Examples of Striations in the Current Context

While pondering the inspiration of striated and smooth spaces, I reflected on the findings of my study and began to recognize patterns and ask pertinent questions: Are there striated spaces in Southtown? If so, what policies and practices create(d) them? As I considered findings garnered via archives and interviews concerning the historical racism, housing policies and poverty in Southtown, as well as the specific needs of this particular group of young women, I was reminded again by St. Pierre (2000) that “Nothing is innocent, particularly places striated from centuries of patriarchy and racial prejudice and unremarked poverty” (p. 268). Thus, the students attending YWLS came to the educational setting with an inheritance their parents did not earn or wish to pass on. Parents were very clear in interviews that they viewed the creation of YWLS as a form of resistance against societal roadblocks to opportunity. Parents believed that attending this alternative prep school would endow their daughters with the tools they needed to combat barriers to opportunity due to their situated subjectivities such as their race/ethnicity, sex, and humble backgrounds. Conversations with parents and students as well as the principal and teachers revealed their belief that poverty was a key striation that would likely hold the girls back unless specific steps were taken by families and educators to smooth their way, to make alternatives visible and achievable. It was not just a matter of lack of financial resources for food, clothing, or ultimately college tuition. Parents and students clearly indicated that they saw the school and the social justice laborers within the school as those possessing important nonmonetary capital that could and would be shared within this safe space, thus paving the way for a brighter future for the students.

Illustrations of Smooth Space That Is Being Created

Considering St. Pierre's (2000) belief that smooth spaces facilitate self-regeneration, I observed numerous ways the participants at YWLS were attempting to construct smooth spaces for the girls. There were specific leadership practices, curriculum, pedagogy, health, and nutrition programs that were an attempt to create smooth spaces facilitating the freedom the girls needed to "deterritorialize." It was clear that some of the actions taken by faculty and administration were understood and supported, such as providing a rigorous college prep curriculum and strict behavioral codes. But certain attempts to create smooth space by faculty caused consternation among some parents – for example, some teachers' attempts to discuss racism and sexism in the classroom. These educators believed that teaching girls to think critically about the constraints they may face in society due to their intersecting identities (female, poor, Latina), along with identifying specific actions to overcome these constraints, was essential to bringing up a generation of strong, successful women. Ironically, some parents felt their daughters were too fragile or sensitive to learn about particular topics notwithstanding the fact that such knowledge might ultimately strengthen their abilities make more mature decisions in the future.

Ensuing conflict notwithstanding, the faculty and administration did take specific steps to create smooth space for the girls. For example, girls were offered self-defense classes to combat possible physical attacks. The girls also had access to seminars on public speaking from how to effectively introduce themselves in a professional environment to practicing research presentations in a university forum on a local university campus. Students participated in leadership training as well as workshops that bolstered their math, science, and technological skills.

In addition to college prep coursework, students and their families visited postsecondary campuses and attended clinics that detailed the college application, financial aid, and college entrance exams processes. The faculty and administration believed sharing this information and coming alongside family and student in the college admission process were appropriate and caring form of assistance that smoothed the girls' paths for future opportunities.

Connections with Prior Theory

As I pondered the striation-smooth construct and the pertinence of my observations in the research setting, I was reminded of Pierre Bourdieu's (1979/1984, 1990) work on cultural capital and social reproduction theory. Reminiscent of Bourdieu, I reject the notion that students and families lack cultural capital: Striations are situated outside human beings in societal contexts. Similar to Bourdieu, I acknowledge that the families and students I observed do indeed possess cultural capital. However, what they possess may or may not be recognized by the dominant society as a valid form of currency within certain contexts. Since certain settings value certain cultural capital differently, social justice workers at YWLS deemed it necessary to teach what is valued in certain fields or contexts to show students how they, too, can acquire negotiable currency to gain entrance and navigate new contexts (e.g., higher education). Ultimately, YWLS is also addressing Bourdieu's idea of *habitus* which is defined by Winkle-Wagner and McKinney (2010) as "the sets of actions that one sees as available" based on one's location and outlook and the accumulations of one's cultural capital (p. 5). Habitus entails the socialization process which, according to Bourdieu, functions below the surface of consciousness that prompt individuals in regard to the rules of interaction as well as the actions and opportunities that one views as available and obtainable.

This connects with the striation-smooth construct when YWLS faculty view the girls' new socialization processes as learning the "rules of the game," that is, knowing the expectations of college students as well as encouraging the girls to critically examine their social location due to their intersecting identities. They also share the numerous opportunities available to the girls and facilitate goal setting. Then, the faculty mentor students as they craft a plan of action to reach those goals. They smooth space by practicing new skills (e.g., dining etiquette and making research presentations). Rather than denouncing their students' existing cultural capital, they help the girls *add* to their existing cultural capital.

The literature on leading schools for social justice resonates with the current discussion. Blount (2008), Dantley and Tillman (2009), and Walker (2006) purported building an organizational culture committed to achieving just outcomes for all students requires specific, political, personal, and professional steps: If the goal of public education is the "full and equal participation of all groups in society, where resources are distributed equitably, members are physically and psychologically safe, and members interact in a self-determining and interdependent manner" (Walker, p. 115), then a major effort is needed to transform our school cultures by leaders who are "democratic, participatory, and inclusive" and who help others recognize "issues of inequality, inequity, and oppression" (Walker) due to intersecting identities in historical context (Blount).

Specifically, Dantley and Tillman (2009) forwarded the notion that school leaders recognize context and understand students' realities. Moreover, according to Shields (2004), if the school director forefronts student identities while developing their leadership practices, a more caring pedagogy will emerge. Further, the five specific characteristics of social justice leadership forwarded by Dantley and Tillman dovetail with the new striation-smooth social justice theory, namely, leaders for social justice show an awareness of the broader socio-politico-cultural contexts of schooling, actively critique marginalizing behaviors and attitudes, profess and practice democratic leadership, demonstrate a moral obligation to students to balance knowledge of negative probabilities with hopeful possibilities, and commit to laboring for social justice for students rather than merely talking about it.

Going Beyond Prior Theory

While considering the generation of theory building promoted by "Facilitating social justice by creating smooth spaces in striated places," it is important to note the ways in which this new construct goes beyond what has come before. While Bourdieu's (1979/1984, 1990) theories are helpful for understanding and identifying the ways inequities are socially reproduced in our society – especially in educational contexts – it does not help us explain how school leaders might resist socially reproduced inequities or come alongside students as coworkers of resistance. Similarly, Dantley and Tillman's (2009) description of what leadership for social justice in schools should entail was useful toward (re)imagining what specific steps might be taken by faculty and administrators for facilitating social justice in their schools.

The construct I forward here scaffolds upon prior theory by additionally detailing specific ways school workers labor for social justice in their schools and hopefully presents a catalyst for future researchers to improve upon my ideas. Rather than "own" this new theory of social justice and explicitly detail a list of "rules," I wish to share my ideas to facilitate the creative thinking of others. Thus, as a summary of the striation-smooth construct, I list questions that may act as a framework to scaffold future research concerning educational inequalities and how school workers might come alongside students and families in their activism. First, reflecting on the ideas of St. Pierre (2000):

1. What are examples of how the students' lives are "coded, defined, bounded" where they have agency, yet their movement is defined in advance?
2. How are stakeholders constructing their subjectivities within the limits and possibilities available to them?
3. How are students confronting the constraints of the past and learning to what extent they can free themselves from subjectivities embedded in their history, and thus, form a new future?
4. What are examples of deep, internal reflection that reveal the students are learning to know where they stand to enable them to judge where they are and construct where they might rather be?

Secondly, reflecting on the ideas of Lather (1991):

5. How are stakeholders facilitating Lather's idea of empowerment?
6. Are stakeholders analyzing ideas about the causes of powerlessness, recognizing oppression, and acting collectively and individually to change conditions?
7. In examining a specific school site, what are some examples of allies coming alongside students?
8. Is the concept of humility present? If so, how? If not, how is an opposing attitude manifest?

Thirdly, considering Freire's (1970) work:

9. How are stakeholders collectively working to diminish barriers while creating breathing space to accomplish full, human creativity and capacity?

10. How are stakeholders facilitating conditions that encourage the quest for human completion?
11. What are some examples of liberation being as painful as childbirth?
12. How are stakeholders struggling to recognize realities of oppression without succumbing to a fatalistic mindset; rather identifying transformational opportunities?

While specific striations may be historically and geographically constituted, and tools for crafting smooth space is context – and individual – dependent, the theory presented here has potential to be translated globally in a variety of circumstances. In addition to researching educational organizations, the above questions can be asked in other societal settings. Researchers in other fields such as political science, sociology, and urban planning can interrogate the striations that may exist in their particular contexts and how policy and practice can be used to break down existing striations as well as to create smooth space. The framework shared here can be used to scaffold future research in other social contexts and help a wide variety of "cultural workers" (Lather, 1991), from civil rights attorneys to real estate agents, problematize inequalities and how they, too, might come alongside those facing oppressive obstacles.

Conclusion

The purpose of this chapter was to share an original social justice framework that emerged during a long-term empirical study of an urban all-girls' secondary school. Drawing insights from social justice laborers radiating from five continents, the striated-smooth construct is a new interpretive lens that builds upon prior theory. Importantly, this framework reaches beyond prior theory toward a new global theory for examining social justice leadership in schools that has potential to move the field forward as well as well as be applied to other societal contexts.

I am optimistic that the questions above will inspire other educational leadership scholars interested in analyzing school cultures vis-à-vis social (in)justice intent, actions, and/or outcomes. I look forward to seeing how my colleagues around the world might use and expectantly improve upon my meaning-making as they come alongside the communities and schools they love and aspire to serve, thus further scaffolding our knowledge together as a global community to pave the way for *smooth spaces in striated places*.

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Chapter 4
Educational Theory: The Specific Case of Social Justice as an Educational Leadership Construct

Ira Bogotch

Argument Overview

The intent of this chapter is to put forth a series of arguments for why social justice is grounded in the educational realities of human growth and development anywhere in the world. To paraphrase Biesta and Safstrom (2011), educators need to find ways to speak as educators, not through other disciplinary ways of knowing. In so doing, educators will not just speak *about* or *for* education, but, as educators, speak directly to, engage with, and challenge the dominant discourses in the world. The intent here is to relocate the place of education as education. William Pinar (2001), a curriculum theorist, "encourages a person's development through knowledge, learning as a form of self-encounter and encounter with what is other and different" (p. 6).Curriculum is one educational pathway that connects the relationships among self, society, and subject matter. To which, educational leadership has been inserted here as a specific case because of its distinctive features with respect to adult learning and its access, abuses, and moral uses of power.

Thus, if education is to have a specific role in understanding and promoting social justice, then educators themselves need to mentor intellectual and political thought (Lugg, 2012, personal communication), across selves and societies. Further, I will argue that the necessary relationships of education to social, political, and economic discourses are grounded in quality of life indicators (e.g., UNESCO, Human Development Index), rather than studied empirically as a series of bivariate correlations with political, economic, and social indicators. It is education per se that translates into civic and vocational opportunities, the pursuits of happiness, and

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the joys inherent in learning. These translations, however, are always contingent upon diverse conditions throughout the world, some of which can only be called *horrific*. For this reason, social justice as educational theories and practices can never be guaranteed as the world remains imperfect, unpredictable, and unstable.

Why insert educational leadership? There are distinctive features in the field of educational leadership which contribute to its specific moral responsibilities. Educational leaders have a moral and political responsibility to educate (attend to) others – both children and adults – about the dynamics of power. This leadership responsibility is pedagogical, meaning that educational leaders inform others of their own sources of power and the possibilities for using power. Thus, the relationship between educational leadership and others is reciprocal, translating the lessons of power so as to create opportunities for others to better their lives. Social justice outcomes have to be accountable for every generation in order for injustice not to extend beyond a person's lifetime; for, unless social justice is self-evident to today's generation, then the conditions for future changes in people's lives will not be seen as real. In cases where social justice is delayed beyond a generation, then it must give way – eventually – to social revolution.

This place of educational leadership comes with its own advantages and privileges, internally. However, within the wider international communities, all educators, including formal educational leaders, speak as a disadvantaged, underprivileged, and minority voice when interacting with dominant discourses such as those communicated by the vocations of science, law, religion, economics, medicine, genetics, computer science, telecommunications, etc. The place of educational leadership turns on its ability to re-engage with these dominant discourses so as to critically challenge the latter's truth claims (i.e., the validity of experts).

Trust in the predictions of experts, in any discipline, can be misplaced. What percentage of accuracy is found in the science of weather forecasts? Political science?

> It's an open secret in my discipline: in terms of accurate political predictions (the field's benchmark for what counts as science), my colleagues have failed spectacularly and wasted colossal amounts of time and money. The most obvious example may be political scientists' insistence, during the cold war, that the Soviet Union would persist as a nuclear threat to the United States. In 1993, in the journal *International Security*, for example, the cold war historian John Lewis Gaddis wrote that the demise of the Soviet Union was "of such importance that no approach to the study of international relations claiming both foresight and competence should have failed to see it coming." And yet, he noted, "None actually did so." (Stevens, June 23, 2012 http://www.nytimes.com/2012/06/24/opinion/sunday/political-scientists-are-lousy-forecasters.html?pagewanted=all)

Economics?

> "I'm not good at math, I don't know a lot of econometrics, and I also don't know how to do theory. If you ask me about whether the stock market's going up or down, if you ask me whether the economy's going to grow or shrink, if you ask me whether deflation's good or bad, if you ask me about taxes – I mean, it would be total fakery if I said I knew anything about any of those things." (Levitt & Dubner, 2005, p. xxiv)

It is not just the disciplines of weather, political science, or economics that concern us. What concerns us is education's relationship to all disciplinary ways of knowing and how as educators we can re-center the PLACE of education. To that objective, we know the significance that making mistakes play in continuous learning, that is, if we are educated to think reflectively and critically in the spirit of John Dewey, especially his ideas of laboratory learning (see below), we learn from mistakes so as to improve people's conditions in life. But even inside education, the idea of rethinking theory and practice – admitting past and ongoing errors – is not as transparent as it needs to be. Educational leadership researchers will need to turn their critical methods onto their own truth claims made by those who promote their own conceptual frameworks and methods and which delimit the many alternative possibilities for education in terms of theories, practices, and methods. To reiterate, the legitimacy of social justice as an educational construct lies in making tangible differences in other people's lives, not in how we, as educators, practice education, good, bad, or indifferently. To quote Eisner (2002), "the function of schooling is not to enable students to do better in school. The function of schooling is to enable students to do better in life" (p. 369).

Operationalizing Social Justice as an Educational Construct

A decade before the ideas of social justice became central to my conceptual framework, I was engaged in numerous empirical studies (1988–2001), focusing on the discretionary behaviors of school leaders, their language use, modes of communications, and the differences found in these variables of interest across school settings and contexts of leadership. I was never able to assert my empirical findings in any definitive manner as the statistical significance or variations that were explained always suggested the presence of "don't know" responses and "untold stories." It was as if the findings *could be otherwise*.

In one series of studies, I named this phenomenon "the contexts of partial truths" (Bogotch & Roy, 1997). What's more, I began to see contexts as more than the discretely named variables of race, class, gender, sexual orientation, geography, etc. The variables, when they were combined, became plots or "storylines" as part of multiple narratives that communicated (or not) meanings and truths (Bogotch, Keaster, Baldwin, &Wonycott, 1995). At first, I tried to make the organizational arrangement of site-based management/shared decision-making fit how school leaders were operating best within schools (Bauer & Bogotch, 2001). And while school-based management appealed to me as a way to share power and decision-making, I always "knew" that something was missing from the analysis. For me, that something emerged years later as social justice, as a deliberate purpose for educational leadership. It was social justice as a concept that opened the school doors beyond developing and excelling at the many complex tasks of teaching, learning, and leading. In other words, in addition to the variables interacting as contextual storylines, I began to think that education needed to be part of a larger, necessary conversation, one worthy of the words education and leadership.

From 1999 to my first publication on the relationship between educational leadership and social justice in 2002 (Bogotch, 2002), I hypothesized two pathways to social justice in education, one for individuals and the other for individuals working within communities. The data came from already published life stories of teachers and leaders. What I found to be significant, but not at all original, was that (1) some educators are attuned to changes in the world and adapt their leadership practices, school curriculum, and pedagogies to those beyond-school changes, and (2) the two pathways could potentially lead to material differences in the lives of students and their families. The conditional verb tense here is key. That is, organizational outcomes and professional relationships were found to be fleeting and fragile, respectively. And so, even with the necessity to pursue better living conditions among peoples of the world, positive outcomes were never a guarantee despite good intentions and good work. Social justice as a practice, while seemingly necessary, was not sufficient.

There were two other key findings from this work: (1) the operating principles of social justice which emerged from the study came as much from my analysis of data as it did from my literature reviews and conceptual frameworks, and (2) social justice as a deliberate intervention was analogous to Dewey's "laboratory learning." As a result of the first insight, I changed the subtitle of the 2002 article from "theory into practice" to "practice into theory" (Bogotch, 2002). In terms of laboratory learning, the meanings of social justice were experiential reconstructions of existing ideas that translated into new ideas. Laboratory learning was the developmental process leading to new knowledge, rather than delimited to the transmission of already existing knowledge. For me, social justice added a purposefulness even as it could not be guaranteed as an outcome of educational practices. As such, social justice became a moral responsibility in terms of how educational leaders used their power. Retelling this storyline points out that I never intended to become an educational leader for social justice. Rather, I followed the data which told me initially that it *could be otherwise* and that it was up to educators themselves to create spaces, bridges, and the PLACE for social justice inside the field of educational leadership.

This transition from empirical researcher to a leader-researcher for social justice was a 10-year scholarly journey. For me, the notion of postmodern conditions merged with an appreciation for critical theory approaches used to interpret educational policies, programs, reforms, and research methods. During this period, I was mostly influenced by the works, among others, of Luis Miron, Spencer Maxcy, William Foster, Carolyn Shields, Jill Blackmore, Patti Lather, Gert Biesta, Catherine Lugg, Jackie Blount, Fenwick English, and Jonathan Jansen. These authors, and others, helped me to see how social justice is a purposeful goal of education in terms of vision, processes, and activities connecting school work to community activities locally and beyond.

From 2004 to 2008, I was fortunate to be part of a small group of scholars willing to have an extended conversation on leadership for social justice. The members included Jeffrey Brooks, Floyd Beachum, Jackie Blount, and Fenwick English. These conversations marked by conference presentations culminated in a theoretical discussion of the meanings of social justice titled *Radicalizing Educational Leadership: Dimensions of Social Justice* (2008). The intent of the book was to establish that "theory matters," but it left open to continuous debate which theories toward social justice might matter more (or less). What I was able to conclude, however, was that (1) social justice as an educational construct was *much more* than what we currently call democratic schooling and community education and *much less* than what we hold out as the ideals of progressing toward a just and democratic society and a new humanity worldwide, and (2) educators needed to become *more political* internationally, nationally, and locally, *more active* socially in their communities and organizations, and *more critical* of existing educational theories and practices.

It was also during these years that the practices of good teaching, standards, accountability, and moral leadership began to coalesce into one predominant category framed by teaching, research, and service in higher education, while the social injustices of poverty and horrific life and death circumstances emerged as a separate category of problems. The question would be whether this latter category of problems fell within the professional domain of educational leaders. Problems such as poverty represent what might be called the "hard" truths, that is, intractable problems often addressed by leading scholars in other disciplines such as economics, politics, policy, health fields, but not central to the work of educators. As discussed in Chap. 1 of the *handbook*, the first category highlights research on reform, school improvement, and implementation issues, while the so-called hard truths within the second category are identified in the literature as dilemmas, paradoxes, and contradictions facing educational leaders.

This division of categorical problems raises another question, that is, whether dilemmas, paradoxes, and contradictions are anomalies that are tenable realities to the field of educational leadership or, instead, untenable realities to be addressed head on by educational leaders. In other words, can you and I live with social, economic, educational, and political injustices, or are they unacceptable, thus requiring our attention? What this question asks is whether education can continue to ignore the sociocultural influences on education. It is this political and ethical crossroad that redefines leadership for social justice in terms of research agendas, professional development, policy initiatives, interventions, and preparing future educational leaders (see Schoorman & Bogotch, 2010).

The leadership challenge raised by the above synopsis revolves around the PLACE of education with respect to the dominant discourses in the world and how educational leadership as both theory and practice is able to engage in social, economic, and political theory debates. My response here is to posit the following operating principles for your consideration:

1. Social justice is both necessary and contingent with respect to education, that is, social justice can never be guaranteed or sustained without continuous efforts, including work within difficult – undemocratic- circumstances.
2. Social justice, as a deliberate intervention, is different from good teaching and moral leadership.

3. Educational researchers come to know social justice through consequences experienced by participants, not by:
    (a) A priori theoretical concepts
    (b) Well-intentioned dispositions of researchers
    (c) Researcher awareness of inequities
    (d) A diagnosis of problems by researchers
4. As such, social justice is defined by participants and validated by researchers post hoc.

Operating Principles 1–4: Social Justice Is Both Necessary and Contingent with Respect to Education

The words “necessary,” “sufficient,” and “contingent” speak to the meaning of theory, in this particular instance, the meaning of *social justice*. On the one hand, we assume that unless we know upfront the meaning of the terms “social” and “justice,” and the phrase “social justice,” we cannot have an intelligent conversation on this topic. There are many educational researchers who not only hold this position but who also dismiss social justice as beyond the scope of educational leadership research and practice. Other researchers state their own definitions of social justice at the beginning of the study as follows: “for purposes of this study, social justice means….” In their design and conduct of the research, data are analyzed to determine whether the data fit the specified definition. If so, then the researcher concludes that social justice was found (rarely not) through this particular empirical study. For me this describes one “state of the art” in terms of educational leadership for social justice research and teaching.

In contrast, there are researchers who believe that words have multiple meanings depending upon when, where, and how the term is being used. To this point, words are understood “in context.” Thus, the idea that a word or a phrase can be both necessary and contingent is not only possible, but likely. Such is the nature of social justice; it is not one thing, one program, one policy, and one anything, which includes how to understand the findings from empirical studies as *it could be otherwise*.

As educators, our task is to inquire after the different meanings of social justice. In so doing, we ask questions related to teaching, learning, leadership, and sociocultural influences on educational practices. For example, we might ask, are individuals, groups, or even nations capable of creating socially just conditions for others? How do the meanings of social justice vary across cultures? Moreover, we ask questions in order to advance knowledge beyond what we currently know and understand. Therefore, while definitions are helpful, leading us to ask more probing questions, that is not the whole or end of any educational discussion. Definitions, regardless of how logical or rational the consensus, do not constitute the whole of human reality. We should be skeptical, therefore, when we read or hear a single definition of social justice in a strict semantic sense.

We should also be skeptical when a researcher tells us that they "found" social justice in practice. My argument has been that social justice as an educational construct is *validated* by outcomes and opportunities experienced *by others* and, thus, are known by community members, research participants, organizational followers, or worldwide citizens prior to the knowledge gained by researchers. It is in collaboration between the researchers and participants that the self and the other become mutually engaged in social justice work – within and beyond educational institutions.

As such, educational leadership theory is at a crossroads: does it focus on variables of school improvement that can be "controlled" or does educational theory need to be extended and translated beyond school-based contexts? The response of this *handbook* is to translate traditional meanings of educational terms such as curriculum and pedagogy to be viewed as interventions (i.e., practices, policies, preparation, advocacy, activism) for addressing social injustices every day and everywhere. Thus, the major argument being put forth in this chapter focuses on how to engage and re-center the educational discourses within and beyond "operational concerns" (Weiss, 1991) whether in schools or universities. Among the many operational concerns are ongoing educational reforms, the improvement of schools/universities, and participation in international rankings, all of which constrain the possibilities inherent in the powers of education. Thus, the scope and dimensions of education are far wider than the so-called comprehensive models or scaled-up models of educational reformers who delimit their research designs to the functioning and outcomes of educational institutions, schools/universities (e.g., Leithwood, 2009). On the individual level of action, the scope of education goes beyond on-the-shelf mission statements, formally written job descriptions, organizational and individual fit, and endless "to-do" lists of school and university administrators.

When educational theory and practice are subjected to critical interrogations through the specific case of social justice as an educational leadership construct, the very meanings and purposes of education must be rethought. In terms of language, the words curriculum, pedagogy, administration, leadership as well as "social" and "justice" are powerful and in play but with broader social and political emphases. Thus, in terms of schooling and specifically curriculum content, every subject matter taught in schools/universities has social, political, and economic connections to life outside the classroom lesson and classroom interactions. Educational theory is about improving the quality of people's lives, not just focused on organizational topics such as school-age grade levels and promotions, reading and math instruction, raising standardized test scores, or securing higher international rankings. Given the very real and ongoing inequities around the globe, many of which are horrific, social justice as an educational construct needs to be considered alongside the political and economic distributions of resources that occupy the attention of policymakers.

Each of the 190 plus nations is challenged to re-center how it defines educational quality to meet the needs of its nation's citizens, not just constitutionally. As a result social justice itself is made relevant contextually across geographic locations around the world. Rawls' (1971) principle of difference when applied not just to economics and politics but also to education makes sense. That is, closing gaps has to be about meaningful social and political differences mediated by education, and not measured solely by either national income levels or international test score rankings. In so doing, however, there is consternation that "difference" has been taken too far.

The multiplicity of circumstances and problems around the world means that social justice as an educational construct cannot be associated exclusively with democracy and democratic practices. While there is a body of research that correlates democracy with peace, which qualifies as a preferable state of social justice, there are also studies that correlate democracy with social unrest, ethnic violence, and street crimes. Not every attempt at overthrowing an authoritarian regime leads to democracy (e.g., the Arab Spring). In fact, democratic states are clearly in the minority in the world according to Freedom House. But if you recall Dewey's definition of democracy, it had less to do with governmental institutions than with social relationships. In other words, we can and should hypothesize the possibilities of social justice in all communities and states regardless of how they are ranked by Freedom House or any other international organization. The question is how should educational leaders and researchers intervene when the conditions of social justice are not evident in a community or society? Unless we are willing to ask and answer this question with research participants, then the work of educators will remain as spectators, not participants in the world

The Leadership Challenge: To Engage the Dominant Discourses

The above discussion on necessary and contingent conditions for social justice brings us to the educational leadership challenge of how educators can engage the dominant discourses so as to disrupt the *status quo* and power of disciplinary definitions of social justice. Considering education as a minority status and subjugated knowledge, the question is how education relates to the two levels of dominant discourses. The first dominant discoursal level revolves around transcendent ideas and beliefs. Transcendent ideas posit fixed, if not dogmatic, abstract, and universal principles, all having the qualities of necessity or *it could* not *be otherwise* thinking. The second discoursal level revolves around disciplinary knowledge bases with status and power in Western societies, namely, the fields of law, medicine, especially genetics, and all natural and physical sciences. History and philosophy put these dominant discourses into perspective.

Looking Back Over the History of Ideas

Historically and philosophically, there are various lines of thought ranging from social justice as matter of brute, physical, and psychological force, akin to Thomas Hobbes' state of nature to the many motivations for developing a social contract.

It was the motive of fear, however, that led Sigmund Freud to assert in *Civilization and Its Discontents* that justice is the first principle of civilization."The development of civilization imposes restrictions on [individual liberty], and justice demands that no one shall escape these restrictions." But to understand the meaning of justice in itself, as a pure, ideal construct, we must go back to Plato (translated Cornford, 1945/1964). Bertram Russell (1912/1970), the British philosopher, believed that Plato intended justice to be a pure form of knowledge, and thus:

> If we ask ourselves what justice is, it is natural to proceed by considering this, that, and the other just act, with a view to discovering what they have in common. They must all, in some sense, partake of a common nature, which will be found in whatever is just and in nothing else. This common nature, in virtue of which they are all just, will be justice itself, the pure essence the admixture of which with facts of ordinary life produces the multiplicity of just acts (p. 91–92).

From this epistemological approach, Plato in the *Republic* deconstructs many meanings of justice and injustice until he reaches his systemic conclusion, that is, the certain structures of a rationally just society. Yet, he, too, begins his argument with the psychology of fear and intimidation. In Book 1 (338c), Thrasymachus states: "I affirm that justice is nothing else than the advantage of the stronger." Whether in a democracy or in an autocracy, rulers proclaim what is just for followers, and anyone who deviates from this "law" is punished. However, Plato, through Socrates, points out that rulers are not infallible, and therefore, they and their followers may act in ways that do not lead to advantages (339b-e). Socrates then argues that "advantages" themselves should not be the ends of just acts (341d-342), and even if they were, should not the advantages be focused on followers (346e-347) rather than rulers?

At this point, the question of justice evolved into a discussion of who benefits more, the just or the unjust person? Because the purpose of the above argument was to establish that justice is a virtue, a matter of good conduct for individuals and the state, Socrates has already won the day, and the rest of Book I and the *Republic* was meant to establish the proper role of citizens in a just society and the coming of the philosopher-king.

It is the philosopher-king who knows justice completely and who is charged with bringing justice to society. Thus, justice has both an epistemological dimension – in this case, rational, certain, and absolute knowledge as truth along with a political dimension – that is, to rule and regulate a just society. In the political theories of Plato, Hobbes, Hegel, and Marx, the rules of justice were abstract and universal or, in other words, necessary.

Conversely, there are definitions of social justice that oppose universality and are based on principles of difference. For example, Frederick Hayek (1976) argues that "In a spontaneous order the position of each individual is the resultant of the actions of many other individuals and nobody has the responsibility or the power to assure that these separate actions of many will produce a particular result for a certain person." Hayek goes so far as to call social justice "a mirage," holding that the dangers inherent in state actions threaten liberty and freedom.

In his preface to Volume 2, Hayek (1976) wrote:

> The more I tried to give it [i.e., social justice] a definite meaning, the more it fell apart—the intuitive feeling of indignation which we undeniably often experience in particular instances proved incapable of being justified by a general rule such as the conception of justice demands. (p. xi)

Hayek's epistemology is pluralistic and his politics are decidedly libertarian, favoring the individual's basic constitutional rights of civil liberties, i.e., "the freedom of choosing ends of one's activities" (p. 9) over state authority and state interventions. He argues that we live in a spontaneous order where it is impossible, given our present knowledge, to predict the future. Therefore, we must continuously adapt to situations and events. "The action, or the act of will, is always a particular, concrete, and individual event, while the common rules which guide it are social, general, and abstract" (p. 12). Thus, "a whole system of rules can therefore never be reduced to a purposive construction for known purposes, but must remain to us the inherited system of values guiding that society" (p. 5).

It is not that Hayek does not see a role for government, rather he limits the role of government to generic, basic constitutional protections which include a system of laws against unjust actions as well as a pool of resources similar to what John Rawls (1971) calls a "social minimum" for all. Nevertheless, Hayek considers it logically impossible and politically unjust to use abstract rules to govern particular, free acts of individuals. In quoting David Hume, "a single act of justice is frequently contrary to public interest…" (Hayek, p. 16): echoing the words and actions of John Dewey, Martin Luther King, and Michel Foucault.

According to Iris Young (1990), it is within everyday life that decision-makers engage in realities. She argues that it is not possible to use transcendental reasons to justify political decisions as being just because such transcendent decisions ignore differences among people and differences in contexts. Transcendent decisions which impose its dominant power over people do not fit the circumstances of cultures and differences. She further argues that universalizing one limited aspect of justice such as distribution can never achieve social justice because justice itself is more than the distribution of resources. This view is similar to the arguments offered by the economist Amartya Sen (1999) who injects quality of life as education into economic matters. For Young, justice includes opportunity, self-respect, autonomy, decision-making, cultural capital, and rights. Thus, it is about "participation in deliberation and decision-making" (p. 34) in the real world of politics and economics. At the same time, there are ideals which drive our decisions, and thus Young's critique asks how can we work toward the ideals of community without destroying the [real] possibilities that emerge from such ideals? Her answer is that we should use ideals to inspire us and imagine alternatives to life as it is given.

Turning to the status of dominant discourses, the educational leadership challenge calls for educated peoples to intelligently question, reason, and debate the many scientific religious, social, political, and economic issues of our time. It is a wonder that this has been so difficult given lackluster results of both political and economic predictions. Couple this with the numerous errors or limitations in outcomes and practices associated with dominant fields (e.g., the development of synthetic medicines which cannot keep pace with the mutations of viruses and bacteria, the limitations of laws and punitive sentences which are historically rooted in injustices such as determining who can vote or own property), why has this not shaken the public's confidence in these fields in the same way that problematic educational outcomes have led to questioning the legitimacy of public education – at least in the USA. If the role of science is about truth and the role of philosophy is about meaning, then the role of education is about truth/meaning.

Experience tells us that challenging dominant discourses do not happen by circumstance, accident, or by nature. Speaking out and intervening in all social injustices is a matter for educational leadership – which is a corollary to the Marshall and Young's (2006) bold assertion quoted in Chap. 1 of this volume and repeated here:

> … individuals who are unable or unwilling to purposefully, knowledgeably and courageously work for social justice in education should not be given the privilege of working as a school or district leader. (p. 308)

Further, bold assertions, intelligent questions, and debates are not to be limited to Western and developed societies (Hayden, 2002), but must be extended around the world. What this means is that the assumptions of a Western, liberal democracies which tend to underlie many of the theoretical conceptions/definitions of social justice need to be recontextualized and then reconceptualized. Specifically, Young (1990) argues that the concepts of "marginalization, powerlessness, and violence must be rethought, and perhaps recombined" (p. 258). And the meanings/truths would not be the same internationally. Luis Miron (2006) argued that "in colonized settings, be they national or otherwise ….these subjects cannot speak, and therefore, may lose their agency or become relegated to acts of resistance as passing moments in time…. Silence may be imperative" (p. 12). Silent defiance may be "the only form of dignified resistance to tyranny…. [W]e could by our silence show our indifference to the regime's demands" (Nafisi, 2004, p. 210). Or, as Fanon (1968) concluded, we must search for "unexpected meanings…[a] knowledge of the practice of action" (pp. 146–147). To ignore how the world as a whole – with all of its differences – sees and lives social justice makes no sense educationally. What is clear, however, to me, is that Plato was wrong on this point. Social justice is not for the philosopher-king alone to know fully; social justice is for people to experience contextually with the help of education and educational leaders.

Beginning Again

The arguments made by the operating principles address the necessary and contingent nature of social justice with respect to education as both leadership and research practices. I have argued that leadership for social justice must privilege consequences, not dispositions or theoretical concepts, and it is on these criteria that we ought to hold ourselves accountable. But should we take on social, political, and economic conditions as our professional responsibility? Aren't our plates already overcommitted and overloaded institutionally with operating concerns and organizational functions/tasks? What are the moral responsibilities of being an educational leader? What are our researcher responsibilities with respect to designs and findings that *could be otherwise?*

Rather than answers to these questions, I have argued that the challenge is to participate as educators, pedagogically, in social, political, economic, and even scientific debates. Our theories grounded in laboratory learning make our arguments dynamic and relevant to how individuals relate to their professional knowledge bases and the world. As educators we bring new ideas to policy tables beyond the transmission of static, domesticated, traditional, and balanced ideas. In that sense educational leaders disrupt the *status quo*. Social justice as an educational practice is inclusive of all members of the world's population regardless of governmental structures, cultures, or ideologies, and it accounts for innumerable contingencies of life-influencing individual outcomes or unpredictable consequences of our actions.

Research Issues in Education Leadership Related to the Study of Social Justice

We live in an imperfect world where resources – natural and man-made – and the status of human rights have been inequitably distributed. Thus, the first question for any researcher is to decide whether such inequities have any relationship to education. If the researcher's answer is yes, then, secondly, the educational researcher has to figure out how to insert her/himself into the lived experiences of those suffering from sociopolitical-economic inequities. Unless educators wrestle and participate in the world, we leave "the public and its problems" (Dewey, 1927/1954) to others within the dominant discourses to debate and resolve. The third question has to do with how we practice our profession. Is the state of our methodological practices sufficient to address the inequitable distribution of opportunities and resources?

Previously, I argued that single definitions of complex and contextual terms make no sense educationally. But, *it could be otherwise*. For this reason, it is important for educational researchers to enter into the definitional black holes of social justice and struggle reflexively, analytically, and dialectically. In these discussions, there will be aspects of universal principles, abstract ideas, underlying assumptions, and related concepts – on the one hand. At the same time, there will be arguments, data, and subjective principles that link social justice to concrete situations, local conditions, and specific behaviors. This universal-particularistic complexity is a reflection of the internal and external dynamics that are necessary conditions for studying social justice. These interactions make the study of social justice/educational leadership difficult to validate, even post hoc, if not impossible to generalize. Educational researchers have to develop new methods to meet challenges in a timely manner whenever they arise. Research, at present, does not happen in real time, yet the social injustices affecting children and adults are untenable situations today. How then can our research designs and methods ameliorate social injustices? Should they?

It is said that educational leadership researchers, like educational leadership practices, need to find the "will" to act in terms of methods and treatments. In the specific cases of social justice, where some measure of urgency is warranted, the treatments have to be adjusted continuously in intensity and duration. That is, the methods researchers choose have to be capable of addressing, assessing, treating, and mediating problems directly and continuously. There are no one-way, one-time treatments. If the meanings of social justice convey any real sense of urgency, then the treatments should reflect the actual living conditions creating opportunities to grow and develop.

Finding the Political Will?

In a 2007 University Council of Education Administration symposium addressing what was referred to as the backlash against social justice leadership and research, I spoke about the lessons to be learned from reading the biblical parable of Jonah. The storyline goes as follows:

> In the Old Testament, God commands Jonah to bring a message to the Ninevites to repent for their socially unjust deeds against others. Jonah knew of these people's cruelties, yet rejects God's command – that is, he has no will to do such work. And besides, there has always been cruelty in the world, pitting people of different tribes against one another. Why forgive the Ninevites? The issues drive Jonah to run away from his mission. He goes to sea hoping to become anonymous among strangers. He does not succeed. God brings storms threatening the boat he is on. The seamen first single out Jonah and then throw him overboard to save themselves. What follows, as many children and adults have been taught, is that Jonah is swallowed by a big fish. He remains alive in the fish's stomach. While pondering his fate, he had time to think and reflect. The fish then deposits Jonah on shore near Nineveh, where he grudgingly carries out God's command. The Ninevites repent and are forgiven by God, though not by Jonah, for their past deeds.

Does this Biblical story have moral lessons for us as educational leaders? I looked first for lessons in terms of motivations/dispositions to become leaders for social justice. My conclusion was that unjust acts do not necessarily lead ordinary men and women to act as leaders for social justice. In other words, kindness and forgiveness may not be the first human emotions we have when learning about social injustices. Instead, we may experience feelings of anger and, if perhaps, thoughts of revenge.

I saw also in the parable of Jonah that it may be easier to run away from social injustices given that there are so many social injustices, past and present, in this imperfect world populated by strangers. We can become immune to hearing about social injustices or as suggested in this chapter, our work as educators is so overwhelming in terms of daily tasks (e.g., routines) that we become swallowed up whole and are left with little or no time for reflections and critiques of our lives and the lives of others. If that is so, then even the task of being a good teacher/moral leader may one day too soon become beyond the norm or expectation.

What's more, we can leave the "hard truths" of horrific social injustices to God, God's Will, luck fate, or whatever we may believe in so as to salve our consciences. And if not left to transcendental discourses, then surely our legal systems, international and national institutions, all elected officials, and many others in societies far more able than we to address these problems. For, we are only educators. We can only do what we can do – and working in educational institutions all day is more than sufficient; it is a good in itself, right? I think not.

Jonah did not forgive the perpetrators of social injustice, but he was a necessary and contingent participant in bringing about social justice in one small part of the world. He did his social justice work against his will however, but his actions, the consequences, saved the lives of others. Thus, the notion that what is lacking in the world is the political will to do social justice is not a *sufficient* answer to ameliorating social injustices. There will always be reasons not to help strangers and not to go beyond written job descriptions. Today educational standards, benchmarks, and accountability measures all confirm this within-school reality. That is, just do these tasks well and we have mastered the truths of schooling. As for the "hard truths" of discrimination, poverty, and oppression, well these are realities in the world that have been so for our entire lives, and they are not listed either as benchmarks or course objectives. Again, there are no shortages of discussions on the subject called justice, whether as law, fairness, distribution, recognition, rectification, etc., but everyone of these well-reasoned accounts delimits the role of learning and education, thus reducing the PLACE of education in the world.

The planet earth is our big fish. But all it takes is one good sneeze (viz. Katrina, Ivan, Sandy, Bopha, etc.) for problems experienced by others to become our problems – whether we want to do social justice work or not. Shouldn't we as citizen-educators be prepared and ready to do our share?

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Chapter 5
Ethics and Social Justice: Strangers Passing in the Night?

Robert J. Starratt

Introduction

This chapter is partly autobiographical, the result of my own scholarly journey. That journey began in doctoral studies in an attempt to craft a dissertation in curriculum theory grounded in an epistemology of felt knowledge, the complementarity of imagination and abstract reasoning, and the learners' search for personal significance. That work in curriculum led to an invitation from Tom Sergiovanni, my faculty advisor, to team up on a book on instructional supervision (Sergiovanni & Starratt, 2006), a project that continues today toward its ninth edition. The work in supervision led, oddly enough, to an exploration of the cognitive moral development of teachers as a significant contributor to their teaching efficacy. The research on cognitive moral development led toward two further research agendas, one dealing with the larger perspectives on human development in which cognitive development takes place (Starratt, 2011, 2012) and the other dealing with the larger field of ethics in which moral development is grounded (Starratt, 1994, 2012). The work in ethics led to its application in ethical leadership and the ethics of teaching. The scholarly work in ethics led to years of publications exploring the complexities of ethical leadership and the ethical character of the teaching and learning process (Starratt, 2004, 2005, 2006, 2007, 2008, 2009, 2012). That brings me to the threshold of this chapter, because all that work was carried on while the repeated refrain of "education for social justice" drifted in over the transom of my consciousness. While attempting over the years to keep current with the literature on education for social justice, I have been puzzled by the relatively scant connections made in the literature between social justice in education and ethics in education. In this chapter,

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therefore, I want to explore some of the reasons why those two bodies of scholarship tend not to link up and why it might be beneficial for scholars in both schools to explore more thoughtfully how their separate agendas might be enriched by stronger connections between both concerns. Initially, I'll attempt some clarifications of my understanding of terminology and perspectives that might prove helpful to the construction of my argument.

Multiple Focal Points in Education for Social Justice

Marilyn Cochran-Smith (2010) has recently called attention to the multiplicity of uses of the terminology of teaching for social justice, or education for social justice, as well as to its inadequate theoretical grounding. In the recent *Handbook on Social Justice in Education* (Ayers, Quinn, & Stovall, 2009), for example, the chapter headings deal with topics such as educating the democratic citizen, Black civil rights, gender issues, beyond the justice of the market, race, ethnicity, language, voice and identity, sexual preference and security, making space for diversity, disability classification, and curriculum exclusion. The book includes a chapter on critical theory, but it is not clear that that is the theoretical grounding for all the other chapters. Among these essays it would be hard to find an explicit reference to ethical theory. Another edited book (Chapman & Hobbel, 2010) provides some excellent treatments of social justice pedagogy across the curriculum. The book contains preliminary historical and theoretical chapters, each informative in its own way but still pointing out the multiple—and not necessarily complimentary—perspectives from critical theory, post-structuralism, feminist, and multicultural theory that indicate the diversity of potential sources for developing a notion of social justice. Kevin Kumashiro (2009) offers another insightful treatment of social justice pedagogy across the disciplines. Much of the book is limited to examples, insightful, to be sure, from his own efforts to connect the academic disciplines with social justice perspectives. Another recent edited book, *Social Justice, Peace, and Environmental Education: Transformative Standards* (Andrzejewski, Baltodano, & Symcox, 2009) argues for new curriculum standards that would provide for a greater focus on human rights, peace and nonviolence, social responsibility, and environmental education. The arguments throughout the book appear to issue from a critical theory perspective and are weighted with the rhetoric of that tradition.

Barry Bull's book, *Social Justice in Education, An Introduction* (2008), grounds his work in a political theory of liberty and democracy. Within that framework he takes up issues such as equal opportunity, personal liberty, the financing of education, and multicultural and civic education. He does not attempt to relate political theory to ethical theory as a foundation for social justice in education. Catherine Marshall, an influential figure in mobilizing social justice advocacy among educational scholars, has edited a book with Maricela Oliva on educational leadership for social justice (2006). The book has useful chapters on leaders' advocacy for social justice in schools and school systems. The book argues well for educational leaders in the field to embrace a more activist level of advocacy on behalf of underserved communities. Again, the emphasis is more on political advocacy with little or no mention of the ethical dimension of such advocacy. Another recent book, *Critical Race, Feminism, and Education: A Social Justice Model,* by Menah A.E Pratt-Clark (2010), advocates a critical pedagogy for African American students, especially females, but appears to lack an explicit grounding in ethical theory.

Without claiming that those books exhaust or constitute a fair sample of recent scholarly efforts to bring social justice issues to the conduct of schooling, I nonetheless want to point out that none of these books appear to mention the scholarly field of ethics as offering a potential justification or grounding for their critique and positive proposals. They all take up important issues where one group or another is disadvantaged by the way schools are presently run, where arguments from ethics could bolster their argument.

The many essays one might cite dealing with social justice in education or teaching for social justice could be grouped under a diverse collection of focal points, including the following: race, gender issues, women's voice, class, poverty and distributive justice, political theory, the development of human capabilities, power, personal autonomy and freedom, peace and nonviolence, liberation from class oppression, disability, pedagogy across the curriculum, diversity, a pedagogy of caring and hope, deculturalization, indigenous peoples, and environmental sustainability.

The dominant perspective tends to highlight these social justice issues from a political point of view as issues of rights and constitutional law. Some theoretical sources for these publications on social justice in education include references to neo-Marxism, post-structuralism, critical theory, postmodernism, or Deweian democratic pragmatism.

The literature is sometimes addressed to educators encouraging social justice activism in their civil communities, sometimes to educators encouraging and illustrating social justice advocacy within the classroom and sometimes to educators of educators reporting on examples of social justice advocacy within graduate school courses to be addressed by the practitioners in the field. The influence of members of this broad audience of educators and stakeholders in promoting education for social justice appears to be diluted by the fragmented perspectives of subgroups who are advocating for social justice for their subgroup, without emphasizing the larger issue of social justice for all.

Ethicians, Ethics, and Morality

Turning attention now to the field of ethics, scholars of ethics—whom I call ethicians (some call them ethicists)—and morality, it will be helpful to indicate how I understand what those terms mean, thus indicating where points of difference and convergence might lie between ethics in education and social justice in education.

I understand the term ethics to refer to a traditional branch of philosophy that explores the intelligibility of moral choices and actions and why one would consider some choices and actions good and some bad, some right and some wrong. Ethicians usually connect their concerns with ethics with other aspects of their philosophy, namely, their study of ontology, epistemology, and philosophical anthropology.

That study of the intelligibility behind labeling some actions and choices good or bad often leads to a formulation of ethical principles that form a coherent ethical code to guide human behavior. Some ethical principles label certain actions always and everywhere bad, such as the sexual abuse of children or forms of torture. Other ethical principles label actions such as the taking of another's life as justifiable under certain circumstances such as in warfare or self-defense, but wrong under other circumstances. Those ethical codes or individual principles contained therein sometimes are supported by civil laws that prohibit and punish certain actions.

Often, various professions such as that of medicine or law adopt an ethical code of conduct to guide the practice of the profession. These codes of conduct sometimes provide reasons or principles, but most often the codes simply present prohibitions and recommendations that represent the encouragement of moral behaviors consistent with the integrity of the professional practice.

Another school of ethics is called virtue ethics. Virtue ethics is not so much concerned with providing the intelligibility behind prohibitions against what are considered unethical actions and choices, as it is with arguing the intelligibility of why certain choices and actions are considered virtuous and why they contribute to interpersonal and community flourishing. Often virtue ethics presents the ideal, the constant practice of which eludes the best of us, but which we can often imperfectly realize, despite the admixture of self-interest involved.

Ethics is sometimes understood as providing the motive for acting ethically. In reality, ethics is more concerned with arguing the goodness or badness of an action or decision after the fact. Ethics is not primarily concerned with motivating people to be good. That is the role of parents, teachers, preachers, the police, and civic leaders. Ethics is concerned more with providing those motivators with a reasonable argument for encouraging or discouraging certain decisions and actions. Ethicians might be expected by their followers to be perfectly ethical themselves, to practice what they preach. That is hardly ever the case, however, for ethicians are as prone to make stupid and bad decisions as anyone else. They are probably better ethicians because the experience of their own ethical frailty showed them how the results of bad decisions usually lead to some unwanted consequences, consequences quite the contrary of felicity and flourishing.

Ethics as Historical and Cultural

Ethicians are usually members of the community of philosophers within a particular culture. Theirs is the task of analyzing how certain actions contribute to human felicity and flourishing and others violate the personal integrity of human beings, actions that are totally inconsistent with the common understanding of what constitutes a human being, as well as what constitutes a human community. On the other hand, ethicians are situated in history, in a culture, and often in a religion. Their situatedness leads them to take certain things as natural to human life, as thoroughly consistent with the human condition. These assumptions and certainties will influence how they make sense out of what is good or bad, right or wrong. What other cultures, or their own culture at a later date in its history, would consider ethically unacceptable does not occur to them. This frequent criticism of certain ethical codes does not lead necessarily to ethical relativism. Rather, it leads to an appreciation that all ethical codes and systems are incomplete or flawed and that ethical codes are improved by the struggle of people against ingrained traditions of injustice and oppression, whether we are speaking about slavery, denial of the vote, exclusion of women from most aspects of public life, the divine right of kings, or usury.

Scholarship in ethics may be roughly categorized as grounded in three philosophical perspectives: the classical philosophy of Greeks, later interpreted by Arab scholars, and then taken up in the Middle Ages by European Scholasticism; the European philosophers of the Enlightenment whose perspectives were influenced by the power of the emerging empiricism and mathematical logic in the physical sciences, as well as a humanism that highlighted the rational powers and political rights of the individual, all considered to have ushered in the Age of Modernism; and those philosophers who are seen as espousing postmodernism or late modernism, or reflexive modernism, depending how severely they criticize the glorification of rationality, self-interested individualism, the exercise of power cloaked by the false claim of legitimate superior knowledge by elites and the state, and the physical and symbolic colonization of peoples by claims of superior culture and civilization, often backed by religious justifications.

One may point to contemporary ethicians who write about the ethics of teaching and of the established institution of public schooling primarily from a classical philosophical perspective, others from a modernist philosophical perspective, and still others from a postmodern (of some kind) philosophical perspective. Thus, I would describe the ethical scholarship of David Carr (2000; Carr and Steutel, 1999), as predominantly reflective of a classical perspective in his treatment of virtue ethics from an Aristotelian point of view, and modernist in his ethics applied to contemporary issues in education. His work is not therefore to be discounted. On the contrary, his work has always exhibited careful reasoning and positive kinds of explorations of ethical issues in education.

I would likewise describe the ethical scholarship of Kenneth Strike (2007; with Soltis and Haller, 1998; with Soltis, 1985) as largely reflective of a modernist perspective applied to contemporary issues in education. His more recent work (2007) highlights the central good promoted by an ethical life as human flourishing in a self-governing society, which for Strike equates with a liberal democratic society. Thus, he emphasizes the importance of community in the schooling process and frames many ethical issues in the enactment of the schooling process around democratic principles highlighted in the U.S. Constitution and Bill of Rights. The liberal side of his liberal democracy would tend to favor some forms of possessive individualism, or the social contract theory of self-interested individuals pursuing their interests while respecting the rights of other self-interested individuals to pursue their interests. This view of the "natural" dispositions of humans to focus on their self-interest tends to downplay the "natural" altruistic side of an ethical life. More than a few developmental psychologists, however, would argue that their research on human development tends to identify the focus on self-interest as characteristic of children and adolescents and immature adults, with the achievement of adulthood reflecting an increasingly open disposition toward mutuality and care for others. Thus, adulthood tends to espouse altruism (however imperfectly), while an expressly habitual pursuit of self-interest in adults is criticized as "childish."

On the other hand, he stresses the importance of community, where members come together to debate issues that concern the common good of the community. Here is where Strike would highlight the constitutional constraints imposed by protections of free speech, freedom of religion, freedom to own property, the freedom of equal opportunity as principles to be supported in the conduct of schooling. Though he doesn't mention it expressly, he seems to assume that the "hidden hand" of free market choices will somehow result in human flourishing. Furthermore, although Strike's writings on ethics in education are rich with examples of the complexity of ethical decision making while attempting to promote quality learning for all students, he argues against any strong criticism about the ways schools reflect the biases found in mainstream society in their institutionalized structures and practices, as he has done in an earlier book (1989).

Having pointed out some limitations that I find in Strike's work, he nonetheless is, in my opinion, the best scholar writing about ethics from the classical liberal perspective. As with the work of Carr, educators can learn much about the application of ethics to the teaching and learning process and the leadership of the same.

I would describe the scholarship of contemporary social justice advocates as grounded in one or more schools of thought that might generally be considered postmodernism. My understanding of the historical development of these schools of ethics is that the modernists rejected much of the ontology of the ancients in favor of more scientifically justified perspectives of what was really real and how we can come to know it, as well as much of the philosophical political theory of the ancients—certainly of the feudal divine right of kings and the chain of being that justified that right—in favor of a more constitutional shaping of government to represent the rights of the people who were being governed. Subsequently, in the light of the collapse of empires and horrific wars, there emerged in the twentieth century a questioning of the role of reason and science that were supposed to lead to the advance of civilization. Furthermore, the postmoderns attempted an exposure of the illegitimate power of the state, as well as the elites who supported that illegitimate power, to control the masses through laws and a minimal share in the welfare of the state and powerful corporations. The postmoderns engaged in a critique of just about all that modernism espoused including the privileged status of reason and science, the objectivity of knowledge, the legitimacy and abuses of power and authority, the posturing of European civilization and culture as superior to all others, as well as the political economy that supported the gathering of wealth by the rich and their corporations, while the masses were effectively excluded from a decent share of their prosperity.

Ethics as Problematic

In much of the philosophy coming out of Europe in the last century, the legitimacy of ethics has been questioned. In some cases it has been cast aside altogether as tool of the state and of religion for the control of the masses, justifying the necessity of laws while concealing their grounding in power relations (Bauman, 1993). Others have cast it as a reflection of local culture and tradition, unsupportable by reason and universal logic. The rejection of ethics has included philosophical arguments against the epistemology that supported traditional ethics, either as grounded in religious revelation or in rational analysis by individual actors. While conceding the underlying thrust of these arguments, I side with others who maintain that the search for a grounding of human moral integrity nonetheless still remains a necessary and legitimate intellectual endeavor. Given the critique of the misuse of ethics to support what now appear as unjustifiable claims and assumptions (supporting or tolerating slavery, oppression of women, grossly unequal class systems, the divine rights of rulers, the brutalities of warfare, etc.), that search must necessarily be carried out within the acknowledged limits to certainty and unquestioned loyalty to principle—that is, with an awareness of the strength and proclivity of self-interest to overcome altruism or to cloak self-interest in altruistic rhetoric.

While contemporary ethics may pursue the intelligibility of human integrity, it does so knowing that integrity is almost always compromised in one way or another. Ethicians, therefore, must also pursue the critique of those compromises—compassionately, to be sure, but thoroughly. I say compassionately because, in the complexity of contemporary life, making ethical choices often means making a choice between what appear to be two or more ethical "goods" or between two or more ethical "bads." Despite efforts to develop ethical sensitivity that might better enable educators to perceive the ethical issues embedded in a situation, that sensitivity does not necessarily lead to a clear priority of one decision over another. Nevertheless, these efforts to cultivate ethical sensitivity encourage educators to examine ethically charged situations from multiple perspectives (Langlois, 2011; Leeman & Wardekker, 2011; Nash, 2002). Still, educators have to live with the realization that some ethical decisions end up hurting or are perceived as hurting one of the parties involved in the decision (Strike, 2007).

Along with the human and social sciences and the humanities, ethics can, despite our awareness of its limitations, contribute to the self-knowledge of the human community, a self-knowledge that reminds humans of the horrors, the messes, as well as the goodness they are capable of. Knowing of the abuses that systems of ethics have provided justification for, ethicians have continually to critique one another's work for its own compromised rationalizations and the misuses they are put to serve the self-interests of the powerful and of religious extremists (Bauman, 1993).

Distinctions Between "Ethical," "Moral," and "Morality"

The adjective ethical, on the other hand, is used in a much looser fashion. One speaks of a person being an ethical person, or a transaction as an ethical transaction, or a decision as an ethical decision. The person, transaction, or decision is sometimes called ethical because it seemed intuitively to be the right thing to do or may have been called that by one's parents. If asked to provide the intelligible argument for why something or someone is ethical, the person might not be able to provide the "ethical" explanation, and simply say, "Well, everyone would say that it was so." Often the adjective "moral" is used as the equivalent of the adjective "ethical."

When I use the term ethical, I usually mean that I not only recognize something as ethical but that I could present a reasoned argument why it was consistent or inconsistent with human felicity and flourishing. I might want to distinguish between a *moral* decision or action and an *ethical* decision or action and mean by that distinction that I want to separate a decision made out of *conformity* to a law or a person in authority, from a decision made out of concern for another, a decision that went beyond self-interest to investment in something bigger than my self-concern.

I would distinguish between a preethical disposition to follow the rules imposed by a community (acting morally) from a *personally chosen* ethical disposition to act on behalf of others because that is the person I choose to be (acting ethically). Ethical choices, for me, indicate the involvement of the full self in self-donation on behalf of the other or the community. These kinds of ethical decisions might be less frequent than the decisions made out of a routine performance of my role in any given circumstance, which might be recognized as moral by others, but not involve my full attention to the specifics of the situation or the persons involved in that situation. Nevertheless, I will often use the adjectives ethical and moral interchangeably, partly out of sloppiness and partly because that is the way those adjectives tend to be used in the literature.

"Morality" and "morals" are often used as the abstract term to describe the consistent pattern of moral acts, either conceived as following the rules or grounded in a consistent sense of ethical principles. Morality does not refer, as does ethics, to *the study of the intelligibility* behind calling certain acts moral or immoral. Rather, the term morality or morals is used to name an observable pattern of what a culture or tradition view as moral acts, as being good or bad, right or wrong. Moral education tends to be conceived as a training in developing "moral habits," that is, the repetition of a pattern of moral choices and actions. Sometimes that training involves obedience to rules that are connected to ethical principles but with the stress on obedience, rather than on the good which the principle upholds.

Turiel (1983) distinguishes between obedience to moral principles (telling the truth, respecting people's property) and obedience to other culturally approved traditions such as good manners and correct pronunciation. He provides evidence that children early on can distinguish between them, even though violations in either realm may be considered disobedience and worthy of parental punishment. That distinction points to the awareness that certain acts should always be avoided whether or not anyone else is looking, whereas other acts may be permissible when authorities are not around. Damon's research (1988) has shown a divide between those adults who obey the rules and laws out of respect for the ethical principles they uphold, whereas a significant percent of the adult population see nothing wrong with disobeying the rules and laws when no one else is looking, especially those in authority. Unfortunately, the news media carries examples of the latter almost on a daily basis.

What to Make of This?

The above ruminations and distinctions may have helped to lay out the geography of the concerns of education for social justice advocates and the concerns of the ethics of education advocates. The former tend to see their work as primarily political, calling attention to the reality that education is not politically neutral, but rather that it tends to reflect and reproduce the political, cultural, and economic ideologies of the political, cultural, and financial elites of a society in the interests of maintaining their privileged status in society. Social just advocates view the schools as legitimizing, through the school's representation of how the world works in its curriculum and organizational procedures, the political, cultural, and financial status quo. Advocates for education as social justice see this arrangement of the schooling process as denying those communities of children and their parents their rights as citizens, guaranteed in most cases by law, to an equal opportunity to participate fully in the life of the community. The children not belonging to the political, cultural, and financial elite families find their cultural heritage, their class, and their language disparaged, if only by omission from the curriculum, as well as by administrative procedures. They are encouraged to think, speak, dress, and behave like the children of the elite, and when they do not, they are shunted off into remedial or special programs for children who do not meet the school's norms. That communicates that they are not considered normal; they have failed to aspire to or at least conform to the lifestyle and ideology of the elites. Advocates for education for social justice see this situation as unjust and as institutionalized injustice. However, they tend to see this as politically unjust, not ethically unjust. At least from my reading, they tend to express their opposition to this state of affairs as a political violation of the citizen rights of these children.

The scholars who advocate for a socially just education for these children often cite philosophers and social theorists from the European philosophical traditions of post-structuralism (Foucault), critical theory (Habermas, Marcuse), postmodernism (Bauman, Lyotard), or the Brazilian philosopher, Paulo Freire, a humanist, sometimes neo-Marxist. All of these philosophers have broken new ground in exploring the tensions, contradictions, and complexities of late modernity or postmodernity. They are way ahead of most American ways of thinking about the complexities of life in this new century. One problem for American educators who are introduced to their philosophies, however, is that they employ a new vocabulary that is foreign to most teachers, administrators, superintendents, and policy makers in America.

Most American teachers, administrators, superintendents, and policy makers are quite thoroughly embedded in modernist ideologies derived from the European Enlightenment—explicitly or often tacitly espousing individualism over community, technological rationality over substantive or hermeneutical rationality, capitalism over the welfare state, nationalism over globalism, Anglo-Saxon American cultural superiority over all other cultures, and American military and financial hegemony as the ground for foreign policy. Even with well-intentioned, open-minded, and idealistic students, the language and rhetoric of the above-mentioned philosophical sources that stand behind many university scholars and professors advocating for socially just education seems unintelligible, over inflated, or radical.

Many generations of Americans stand far removed from the exhaustion of the peoples of Europe by the horrors of two world wars, their shattered dreams of modernity as leading the way into a bright, more civilized realization of the human journey. Europeans have had to acknowledge the arrogant and empty claim to Empire through the colonization and enslavement of the rest of the world's peoples. They have lived much closer to the awful recognition that the world's superpowers had at their fingertips (an still do) the "mutual assured destruction" of the human race through thermonuclear weaponry. While Europe has been digging itself out of the rubble of their destroyed dreams, the United States grew enormously prosperous and powerful, confident in its future as the protector and cultivator of democracy, a kind of secular version of salvation. Wrapped in the flag and its ideologies of capitalism and a democracy enacted by a political economy of welfare for the elites and rugged individualism for the poor, it had no cause to critique its own brand of racism, exercised at home through racist laws and abroad through racist foreign policies and its own brand of colonization of small island nations. Though it has failed in its efforts to spread the blessings of its brand of democracy through recent wars, it remains wedded to its self-image of the "best nation in the world," as the present President of the country has proclaimed, while struggling to rescue the country from a deep recession brought on by the rationale of profit at all costs.

My argument is that most Americans are not ready to consider the somewhat apocalyptic pronouncements from European philosophers. Advocates for social justice education are correct in their advocacy. They are not correct, I believe, in voicing that advocacy in the language and rhetoric of the philosophers they cite—not because those philosophers are misguided in their analysis of their experience but because American educators, reflecting the American public, are not ready to receive the critique of their schools voiced in the vocabulary and rhetoric of the Europeans. While continuing to study the rich contributions of the Europeans, American scholars need to translate their message in language and rhetoric that Americans can understand and, with a clear sense of the mission of democratic schooling, begin to address the problems the social justice educators are calling attention to. I believe the use of the political argument for social justice, while framed in less inflammatory or esoteric language, can be far more effective if it is framed from the perspectives of ethics as its ground, with the political and constitutional argument for civil rights as a complementary perspective. Political advocacy can be dismissed as ideological; a critique that addresses abuses as unethical is much more difficult to discount.

Furthermore, there is ample evidence from the psychological research on learning and on teacher effectiveness that the ethics of care provides a necessary ground for exercising a focused application of the ethic of justice in responding to the needs of young learners of whatever race, language community, class, sexual preference, disability, gender, learning style, or religious background. Research on successful urban schools points to the absolute essential of a culture of trust that characterizes all successful schools, no matter the size, or the makeup of the student and teacher communities. Trust so obviously emerges from the experience of caring and being cared for. While educators concerned for social justice obviously work from an ethic of care, they need to refer to that essential ground in their arguments for social justice.

I would argue that educators need to conduct the daily routines of schooling from a multiperspective of three ethics, the ethics of care, justice, and critique (Starratt, 1994, 2012). Each ethic tends to complement the other. Justice without caring can be quite impersonal; care can be fruitless without justice; the acts of both caring and justice may be naïve without confronting through the ethic of critique the silent, structured injustice and the tacit power relations ingrained in the way schools are organized and administered. Conducting the general affairs of the schools guided by the ethic of care, justice, and critique corresponds to what I call the general ethics expected in all varieties of institutional life, whether we are talking about how to run hospitals, government agencies, banks, gas stations, clothing stores, or schools.

Education is also a profession, and as with all professions, the practice of a profession is guided by professional ethics. The professional ethics are concerned with promoting the good intrinsic to the practice: for medicine, health; for law, justice; for architecture, both utility and aesthetics; and for education, the good of learning. Educators for social justice need to look critically at the activity of learning that the school promotes. Too often, it seems, there is an assumption that if children have an adequate opportunity to learn the lessons being taught, to learn the material they will be tested on by the state standardized tests, justice will be served. Of course, educators should also be concerned that the students will have an adequate opportunity to succeed on the test in the language in which it is administered—a point often lost when considering the experience of second language learners who might know the material, but not be able to perform that knowledge due to struggles with the vocabulary and syntax in which test questions are framed.

What I want to emphasize here, however, has to do with the quality of the learning as it is related to the student's understanding of the knowledge in relationship to real life, to its application to multiple issues and problems in the community, and to its coherence with the imagined trajectory of her or his own life. Educators need to be concerned that what the student learns is authentic rather than make-believe or superficial. One might learn how to give back "right" answers to exam questions, answers that correspond to definitions or information provided by the textbook, without that answer having any personal meaning.

Educators who seek to promote the good intrinsic to the activity of learning will always push the students to express or perform what the learning means to them and how it might illuminate or raise issues that involve some aspect of their own life. Students who survive life in schools by giving back right answers without ever taking that knowledge inside, without ever perceiving how that knowledge helps them understand their membership in the worlds of culture, nature, and society, are engaged in a colossal waste of their time, a charade that gets them through the make-believe routines but never touches them where they live. Schools that promote and are satisfied with that kind of make-believe learning are violating the ethics of their profession and are violating the integrity of what they supposedly profess.

Educators for social justice need to get down to this level of ethical critique, for it is there where their advocacy will get at the essential work that schools must engage with their students. It is at that level that the many students who are disadvantaged by the way schools are run really need them. Working at that level with their students, they can help them to confront the world in its promise and in its brokenness, help them to participate in the world either by resisting the world's stereotypes of them and their culture or by exploring the opportunities and the gifts that their culture provides them for making a contribution to the world where they live, by connecting their anticipated future with notions of competence and integrity, creativity, and commitment.

Involvement with their students at this level means designing learning opportunities that connect them with the realities of their lives, enable them to dialogue with those realities, interrogate them, explore them, and navigate them. That is the quality of learning that really promotes the good intrinsic to learning, namely, the discovery of a self in relation to the world, of how to make a contribution of one's gifts and talents to enrich the life of the community.

My argument is that the struggle of educators for social justice could be more effective if it embraced the ethics caring as well as the ethics of caring, along with the language of politics. Insights from philosophers need to be translated into a language of educators, keeping close to the integrity of the learning process and the integrity of the knowledge that is surfaced through the curriculum of the school.

We do not need to be professional ethicians, either, lest we fall into self-righteous posturing of people who have all the answers. Rather, we need to stay close to our roots as educators, applying what we know through our own scholarship as educators and our experience as practitioners of the profession. We certainly need to continue developing ethical sensitivities and analytical ethical frameworks that will help us to articulate how issues and situations that arise in the conduct of our profession carry ethical weight that must be attended to. Integrating an ethical sensitivity with our core values as educators enables us to respond to and cultivate the integrity of our work on behalf of all the children that enter our schools and our classrooms, to see that they are cared for and know it, to see that they are respected for who they are and for the potential that they bring to the work of learning, and to see that the way we organize and operate the school provides advantages to all to do their best.

We cannot indoctrinate them into a political philosophy, however passionately we embrace our own. We have to trust that if in their engagement with the academic as well as the social curriculum of the school we help them to develop both a hopeful and a critical perspective on how the world works, help them explore who they are and who they want to be, so that they will continue to learn how to engage the politics of the world with their own personal integrity.

Our work as educators cannot be politically neutral, but neither should it be doctrinaire. Rather our political philosophy should be large enough to believe and assert that freedom means not the freedom to do whatever you feel like, but that freedom means being free enough to love, free enough to collectively choose the common good more often than choosing narrow self-interests, and free enough to know that our humanity is enriched most when we share it with those who need it at the moment. That seems to me to be the better way we can be ethical and socially just as educators.

Summary

My argument is that educators, both scholars and practitioners, need to ground their advocacy for a socially just educational system in an ethical analysis of how socially unjust school environments violate not only the political rights of students but *violates their persons*. Often schools violate persons through organizational sorting mechanisms that limit their opportunities for a quality education. They also violate the *integrity* of authentic learning—the moral good of the practice of teaching—through a curriculum divorced from the moral agenda of learners to construct themselves through engaging with the realities of their lives while exploring, through the academic curriculum, how they may participate more fully as members of their communities. From those arguments, political advocacy can become stronger, grounded in such ethical analyses, and then ethical analysis can issue in practical responses joined to political engagement. Let the dialogue begin.

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Chapter 6
Social and Cognitive Justice: The Social Relevance of the Higher Education in Latin America

Alejandra Montané López, Judith Naidorf, and António Teodoro

Introduction

Latin America, characterized by being a multicultural and multiethnic region, has become in these early years of the new millennium a demonstration of creativity and social innovation while a laboratory of experiments in privatization and marketing raised to the degree, product of neoliberal policies that plagued the state from the Chilean coup of 1973 onwards. Currently the region is drawn through the coexistence of the worst social inequality with self-organization of complex social justice experiences carried out both by minority groups as movements that have arrived to state power.

The development of renewable forms of democracy present in Latin American countries strengthened since the second half of the twentieth century and the processes of integration of countries in the region that, since the end of this millennium, have taken more autonomous courses while being integrated are demanding forms of social justice to expand and reach those sectors that still lag behind.

The report *The Social Panorama of Latin America* 2008 (CEPAL, 2008) noted as positive elements in the region a significant and continuous rise in economic growth

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since 2002, a strong reduction in poverty in the region since 1990, as well as a slight improvement in income distribution from the first decade of 2000. The same report notes that there are still significant groups of the population which remain in poverty or who have entered in new forms in which it is manifested and that the region remains the most unequal in the world, although not the poorest.

These inequalities affect social cohesion defined as the dialectic between established mechanisms of social inclusion/exclusion and responses, perceptions, and attitudes of the citizenship against the way they operate (CEPAL/EUROsociAL, 2007: 13) and is built on three pillars: gaps, institutions, and relevance (CEPAL/EUROsociAL: 39).

Historical gaps for reasons of ethnicity, gender, and territory are aggravated by inequalities in education, social protection, and productivity. In Latin America, there are currently 522 indigenous peoples ranging from Patagonia and Easter Island to northern Mexico through different geographical areas such as Expanded Chaco, the Amazon, Orinoco, the Andes, the Pacific Coastal Plain, the Continental Caribbean, Lower Central America, and Mesoamerica.[1] Mexico, Bolivia, Guatemala, Peru, and Colombia consist of 87 % of indigenous peoples of Latin America and the Caribbean.

In rural communities there are the highest rates of poverty and extreme poverty and the highest rate of illiteracy; they have less social protection and restricted access to justice and politics. Territorial inequalities are also reflected in urban segregation, given that poor neighborhoods are precarious and have restricted access to services (schools with the greatest needs, crowded environments, increased exposure to violence, less job offers, precarious jobs, poorer health services, and less access to social welfare and security).

The persistent inequality in Latin American societies instills in the population such perceptions that the production system not only produces inequalities, but the institutions themselves incorporate its principles and its practices, the unequal treatment as a criterion at the expense of the weaker. The feeling of exclusion and loss of adherence to such institutions and principles which are determined by the

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[1] Bolivia, Guatemala and Belize stand out as countries where indigenous people represent higher percentages of the total population, with 66.2 %, 39.9 % and 16.6 % respectively. In contrast, countries like El Salvador, Brazil, Argentina, Costa Rica, Paraguay and Venezuela record a low percentage of indigenous population (between 0.2 and 2.3 %). However, in most Latin American countries the indigenous population ranges from 3 to 10 % of all citizens. Mexico, Bolivia, Guatemala, Peru and Colombia gather 87 % of indigenous population in Latin America and the Caribbean with a population that ranges from a maximum of 9.5 million (Mexico) and a minimum of 1,300,000 inhabitants (Colombia). The remaining 13 % of the indigenous population resides in 20 different States. Five indigenous towns, as the most numerous among them, are the Quechua, Nahua, Aymara, Yucatec Maya, and Ki'che ', and six, the Mapuche, Maya Qeqchí, Cakchiquel, Mam, Mixtec and Otomi, with populations between half and one million. According to official censuses made between 2000 and 2008 the total identifiable indigenous population in Latin America is 28,858,580, while in Latin America there live 479,824,248 people. This is an identified percentage of indigenous population of 6.01 %. However, the publication highlights that the number of indigenous people in Latin America is usually set at 10 % of the total population, according to estimates made in 2004 by the United Nations Program for Development (UNPD).

Plan for Equal Opportunities (2008) of, for example, Bolivia is determined as "internal colonialism"[2] stating that "these new settlers will build their structures of privileges as part of an illusory modern nation-state which did not reach the whole territory or the Bolivian society." Internal colonialism, besides enriching the coffers of multinationals and the oligarchies with the product of the cheap labor of workers without benefits, also daily subsidizes the low cost of agricultural products coming from the work of peasant communities (*Plan for Equal Opportunities*, 2008: 7). And it is precisely Bolivia, one of the contemporary leading laboratories for social justice in Latin America, that proclaimed in the Constitution (2008) *a Unitary Social State with Community Pluri-national Law, free, independent, sovereign, democratic, intercultural decentralized and with autonomous regions. Bolivia is based on plurality and political, economic, legal, cultural and linguistic pluralism within the integration process of the country.*[3]

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[2] The definition of *internal colonialism* is originally linked to phenomena of conquest, where native populations are not exterminated and are part of, first, of the colonial state, and then of the state that acquires a formal independence, what initiates a process of freedom, of transition to socialism, or recolonization and return to neoliberal capitalism. Peoples, minorities, or colonized nations by the nation-state suffer similar conditions to those that characterize colonialism and neocolonialism at an international level: they live in a territory with no self-government and are in an unequal position facing the elite of the dominant ethnic groups and the classes within them, their administration and legal and political responsibility concerning the dominant ethnic groups, the bourgeoisie and oligarchies of the central government, or the allies and subordinates of the same; their inhabitants do not participate at the highest political and military positions of the central government, except as "assimilated"; the rights of its people and its economic, political, social, and cultural development are regulated and enforced by the central government; in general, the colonized within a nation-state belong to a "race" other than the one that dominates the national government, which is considered "inferior" or, at best, is converted into a "liberating" symbol that is part of the state demagogy; most of the colonized are part to a different culture and speak a language other than the "national" (González Casanova, Pablo. *Colonialismo interno. Una redefinición.* www.bibliotecavirtual.clacso.org.ar/).

[3] *Article 1.* Bolivia is a Unitary Social State with Community Pluri-national Law, free, independent, sovereign, democratic, intercultural, decentralized and with autonomous regions. Bolivia is based on plurality and political, economic, legal, cultural, and linguistic pluralism within the integration process of the country.

Article 2. Given the precolonial existence of nations and peasant indigenous population and their ancestral domain over their territories, their self-determination within the framework of the unity of the state is ensured, which consists in their right to autonomy, to self-government, to their culture, to the recognition of their institutions, and to the consolidation of their territorial units, under this constitution and the law.

Article 3. The Bolivian nation is made up of all the Bolivians, nations and peasant indigenous peoples, the intercultural communities, and Afro-Bolivian which together constitute the Bolivian people.

Article 4. The State respects and guarantees freedom of religion and spiritual beliefs, according to their worldviews. The state is independent of religion.

Article 5. I. The official languages of the State are the Castilian and all the languages of the nations and peasant indigenous peoples, which are the Aymara, Araona, Baur, Besir, Canichana, Cavineño, Cayubaba, Chaacs, Shaman, Ejja, Guarani, Guarasu'we, Guarayu, Itonama, Leco, Machajuyai-Kallawaya, Machineries, Maropa, Mojeñotrinitario, Mojeño-Ignatian, Moré, Mosetén, Movima, Pacawara, Puquina, Quechua, SirionoTacana, Tapiete, Toromona, Uru-Chipaya, Weenhayek, Yaminawa, Yuki, Yuracaré, and Zamuco.

The current challenge is to find integration strategies that respect the local values and redeem them and that different Latin American institutional forms continue to reflect on them without imposing exogenous models in order to recover its rich history as well as to transform the education policies that lead to a fairer society and find ways to integrate, which based on rigorous social research, and propose new forms of engagement with the society to be. The present social and innovative experiences in Latin America have the potential to be key contributions to the renewal of social theory: the access of workers to the presidency, indigenous leaders, creation of multiethnic and multinational states, female-headed presidency, among others.

Although as stated by the writer Julio Cortázar in 1983 with the power of his words until today, "the reality of the southern hemisphere countries is not uniform: in every Latin American country nuances are so great that uniform comparisons are a failure. As the attempt to export models A in the country B are a failure." The "not uniform" study we are part[4] and the respect and appreciation of diversity allow us to understand the common (social cohesion is by us understood as a joint project) and think we can do it within the desirable future.

Higher Education and Social Cohesion in Latin America

The very democratic development in Latin American countries, as already mentioned, reinforced from the second half of the twentieth century led to a significant development of higher education in Latin America.

As happened all over the world, the welfare state and social policies that expanded the so-called medium "layers" of society led to a growth in enrollment in higher education product of the expectations placed upon this institution as a form of social advancement.

Between 1975 and 2005, enrollment in higher education in Latin America practically quadrupled exceeding 16 million students. At the beginning of the century, higher education systems in Latin America continue to expand at annual rates that go from nearly 3 to 7 %, with the exception of Brazil which grows at a rate close to 12 % (Higher Education Report in Latin America, 2007).

This spectacular development, completed with new and innovative social practices and closer to models of educational development, coexists with high levels of exclusion, poverty, and inequality that act as barriers that limit access to opportunities for progress and facilitate more people in improving the material conditions that emerged in the last 60 years.

Basic imbalance of equity tends to increase the selective nature of universities and other institutions of higher education (Report Higher Education in Latin America, 2007) and produce undesirable effects on the redistribution of knowledge increasingly necessary for the performance of responsible citizenship.

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[4] The authors of this chapter are members of the Ibero-American Network of Educational Policy Research (Red Ibero-Americana de Investigación en PolíticasEducacionales – RIAIPE).

In a general way, we can determine that the various problem areas in relation to higher education are determined by the inequalities and can be grouped into the following:

1. Access to higher education is distributed differently in the various regions and within Latin American countries themselves. There is a trend in higher education institutions to persistent problems of access for vulnerable groups (women, indigenous population, the poor and urban vulnerable groups) to a higher education of quality at universities in Latin America.
2. The permanence as indicated in Report on *Higher Education in Latin America and the Caribbean* (IESALC, 2001–2005) that the process of abandonment (dropouts) of college students, especially at the end of the first years of the course is a priority issue of concern to all stakeholders in the system. Social exclusion is detected in vast majorities who cannot stay in the university system.
3. The mobility of students and researchers in Latin America is clearly insufficient, so higher education does not integrate fully at the international level. According to the report "Education in Latin America 2007," Latin America offers enrollment for just 3 % of the world's mobile students studying abroad and contributes 7 % of mobile students to study outside their country of origin.
4. Current processes of transformation of higher education in Latin America are conducted by a regional coordination between higher education institutes (HEIs) to stimulate social development and more balanced and equitable development of the region.
5. Higher education institutions in Latin America have built an internal operating logic which in some cases separates them from the solution of real problems of society, so that the vast majority does not have impact on the overall development of societies where they are located.
6. Traditional curricula and associated educational practices of Latin American universities tend to offer programs that do not always meet the needs of the region and support the development of communities. There is the need for greater relevance of its mission and functioning with society. In this sense, the curriculum becomes a relevant field of negotiation of equity and social cohesion.
7. The potential development of a common area of higher education in the HEIs should promote their role and be proactive in their participation in policy.
8. Policies and practices should respond to a territorial logic placed to overcome the unequal progress of inclusion, participation, and greater equity. This means that terms of reference have to do with the expectations and goals of the societies in relation to what they expect from their universities and the role they should play in supporting the development of their societies.
9. While there are HEIs in LA which have built good relations with society and enhance the development of the societies in which they are embedded, there are still areas in which universities in the region, public and private, are disconnected from social issues. The crisis is manifested in terms of the existence or

lack of viable options and educational opportunities for people seeking access to the HEIs. Unfortunately, it is the more vulnerable populations that ultimately cannot afford higher education studies of high quality in many Latin American countries.

10. The exclusion of indigenous peoples and their knowledge of higher education is a matter to be resolved. Indigenous peoples have suffered exclusion at all levels and dimensions and have erupted in recent decades in regional politics with just demands for an intercultural higher education, based in principles of autonomy and relevance.[5]

The Power of Theory Applied to Specific Practice Settings

Education, its practices, and specific theories have relevant characteristics when thinking about building a continuous theory of social justice as stated in Bogotch et al. (2008). On the way to the establishment of a theory of social justice in education, the specific practices that are currently performed in some institutions in Latin America (also called by some groups the *best practices*) are an important input almost never taken into account when programming educational policy measures for the region. The failure of constrictor recipes that are "recommended" through loans from international organizations as well as the best intentions by foreign institutions is an important object of analysis and reflection for future judgments and statements of education policy. A theory of social justice in education yet to be defined should definitely fix those errors from a new perspective to build conceptual and analytical tools that compose it.

Among the best practices for social justice in universities, we can highlight *the color policies* in Brazil and the practices linked to the social commitment that some Argentinian universities have made with renewed features after the 2001 crisis, such as re-centering of the extension policies they had opened around 1918. Other examples are found in the Aymara indigenous university "Tupac Katari," the Quechua university "Casimiro Huanca," and the Guarani indigenous university "APIAGUAIKI TUPA" included in the Bolivian national educational system or Intercultural Indigenous University which through its operation network covers the 22 member countries of the Indigenous Fund, although at an early stage they have been structured with universities in nine countries: Bolivia, Chile, Costa Rica, Ecuador, Guatemala, Colombia, Mexico, Nicaragua, and Peru.

In this context and from the identification of problems and specific issues of higher education in LA, we have discussed the meaning of the conceptualization of social cohesion.

At the international level, the analysis of the role of higher education in social cohesion implies that "Higher Education plays a vital role in driving social cohesion and Economic Growth" (James et al., 2008) has taken special relevance. This requires a special conceptualization in the context of social justice thinking.

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[5] Examples: Certain higher education experiences in Ecuador, Colombia, and Bolivia; Kallawaya medical school in Bolivia; the project KawsayUnik of indigenous peoples of the Andean countries.

Social cohesion as a topic of study is developed from the 1980s of the last century until finally joining the interests of political, social, and research agents. Globalization and global crises have revived the need to refer to social cohesion in all aspects within the framework of a social theory that supports it.

CEPAL/EUROsociAL (2007) states that in Latin America and the Caribbean, there are strong mutations linked to globalization and technological revolution. In this context, social cohesion is becoming increasingly important, given that its foundations can be eroded by new forms of exclusion, which must be addressed. In fact, several phenomena have been threatened during the neoliberal era, such as the social cohesion in the region, the deepening of the social gap, the economic and cultural trends towards the weakening of the public, and then the exogenous intervention that aims to support the "governance" of states as is the case of Haiti as well as the "better management" of natural resources (water, forest).

Social cohesion is not easily defined, observed, or measured. Andy Green, with Germen Janmaat and Christine Han, in his text *Regimes of Social Cohesion* determines various characteristics related to the difficulty of determining the nature of the concept of social cohesion. First, including both a "normative" dimension and the limits that this normative regulation involves in the analysis[6] adding to the difficulties of assuming social cohesion is always "a good thing".[7] Second, they note that in many cases the term is used synonymously with what is socially desirable, such as tolerance, trust, and citizenship, generating an unjustified isomorphism cannot substitute the rigorous analysis of the concept. Third, they note that social cohesion cannot be defined by its causes (e.g., social equality) or its effects (e.g., greater human development).[8]

The relationship between higher education and social cohesion must be based upon a conceptual determination of the second. We choose to discard the definition of social cohesion associated to forms of consensus and seek to understand it by its quality of perception belonging to a project or common situation. The determination of the dimensions implied involves judgments. As already stated, the dialectic established mechanisms of social inclusion/exclusion and its responses, perceptions, and attitudes of citizenship against the way they operate defines social cohesion (CEPAL/EUROsociAL, 2007: 13).

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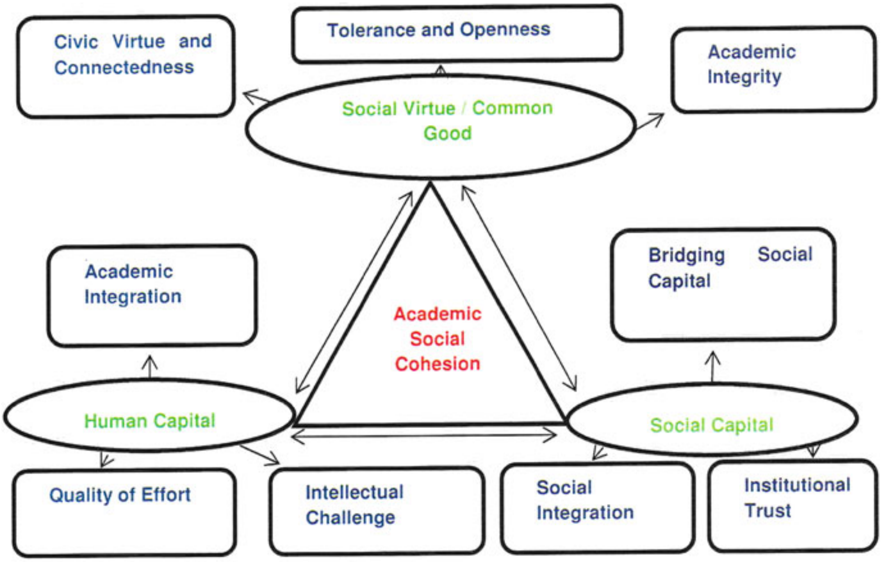
[6] It is almost always used in a normative fashion – that is to say as a signifier for a positive condition for which we ought to strive. This, as with all normative terminology in social science, creates problems for objective analysis, even within a critical realist epistemology that recognizes that subjective beliefs and ideological forces are constitutive of the reality which we seek to understand and which exists independently of our perceptions of it. On the one hand, where social cohesion is defined in a particular normative fashion, according to the political preferences of the researcher or policy analyst, this preempts analysis of the whole phenomenon, including the different forms of social cohesion which may exist in the real world (Green, p-5).

[7] Too much cohesion can, arguably, lead to social insularity and backwardness (Banfield, 1958), economic sclerosis (Olson, 1971), or to a failure to address substantive injustices in society (cf Marx on religion as the "opium of the people" in his "Critique of Hegel's Philosophy of Rights," 1973).

[8] This is problematic not only, again, because it narrows the range of phenomena that may be analyzed as possible incidents of social cohesion but also because it then prevents any analysis of the causes and effects which are already endogenous to the definition. Including causes and effects in the definition amounts to arguing by definition – a logical fallacy which philosophers call "petitio principii" (Durkheim, 1982).

The World Conferences on Higher Education (WCHE) since 1998 to 2009 gave a new thrust to UNESCO's higher education program at a time when a need for change and adjustment to a new paradigm in higher education was strongly felt by decision makers. In the different World Declarations on Higher Education for the Twenty-First Century, they provided an international framework for action both at the systems and institutional levels. A particular focus was placed on broadening access and strengthening higher education as a key factor of development; enhancing quality, relevance, and efficiency through closer links to society and the world of work; securing adequate funding resources, both public and private; and fostering international cooperation and partnerships. One spin-off of the World Conference was the UNESCO Forum on Higher Education, Research and Knowledge, an open platform forum encouraging research and intellectual debate. Within these general orientations and delivery mechanisms, research on trends in higher education remains at the heart of UNESCO's preoccupations, along with the question of higher education and social cohesion (Burnett, 2007: 287–289 en Mendes, 2011).

Within the broad discussion on social cohesion, some authors have opted for the academic analysis of social cohesion in higher education, as is the case of Heuser (2007) who proposes a synthesis model that highlights the main dimensions in the academic social cohesion within higher education.



Source: Heuser (2007:295)

Academic social cohesion in higher education

This model responds to a mono-logical perspective, which gets a great review for the inclusion of the term "social capital" as determined by Somers (2008). They refer to market models.[9]

From our perspective, higher education policy requires a proposal of analysis based on justice and social relevance that is connected to frameworks for social cohesion. Cohesion policy in Latin America could only start from a series of social pacts that enable equity and governance (Machinea & Uthoff, 2005). Along these lines, proposals for a social cohesion covenant are framed which provide four pillars: macroeconomic, labor market, social protection and education, and social cohesion contract (CEPAL/SEGIB, 2007, p. 135), which aims to "seal the deal" and the political commitment around that goal and have the economic resources, political, and institutional resources that make it viable. In the latter case it is to legitimate social cohesion as an object of public policy and promote the institutional conditions necessary for its achievement (CEPAL/EUROsociAL, 2007).

Grammar of Debate: Social Justice and the Relevance of Higher Education – RHEs (Pertinencia de la Educación Superior – PSEs)

The ability of higher education institutions to improve social cohesion in the region, which includes the various mechanisms of inclusion and the perception that they have on their people and that determine their sense of social "belonging," is called *social relevance.*

The term *relevance* was introduced by UNESCO (World Conference on Higher Education 1995, 1998, 2009) in the glossary of higher education, science, and technology policy from the claim that the relevance of higher education must be evaluated in terms of the *appropriateness* between what society expects of institutions and what they do. Special attention must be paid to the roles of higher education to serve society and more specifically to activities aimed at eliminating poverty, intolerance, violence, illiteracy, hunger, environmental degradation, and disease, and activities aimed at promoting peace through an interdisciplinary and transdisciplinary planning (UNESCO, 1998).

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[9] Mendes (2011) critique of the concept of social capital as a public good and its underlying assumptions was put forward by Margaret Somers (2005, 2008). Somers argues that the equation "social + capital" equals the evacuation of the social. Social capital refers to the economic value produced by social relationships. To achieve the practices and institutions of trust, communication, and reciprocity convened in the concept of social capital requires abandoning its constitutive postulates of localism, acquisition, individualism, the market model of efficiency, the marketization of the social, and the radical autonomy from power and politics (Somers, 2008: 235).

In this analysis the RHEs is thought of as a formula that exceeds the established conception of the adaptation of higher education to market requirements and is conceived within the framework of systemic thinking and from the complexity of the needs of all sectors of society and in particular the requirements that apply to the most disadvantaged sectors.

Therefore, the conceptual relevance of the term starts from the consideration that social justice in all its dimensions affects the functions of higher education as a social institution.

To approach the concept of social justice as a key dimension of the RHEs through the definition of inequity and inequality, HEIs work together in their identification, based on a review of different conceptions of social justice to then settle the concept of relevance of higher education.

First we highlight the distributive conception of justice that equates social justice as redistributive action and reallocation of assets and resources, mainly economic, and whose main representatives are John Rawls and Ronald Dworkin. This concept is built on three pillars: the *principle of equal liberty* (where all fundamental freedoms are guaranteed), *the principle of fair equality of opportunities* (equal access chance regardless of social background), and the *difference principle* (referring to the social structure). In the context of this third axis of distributive justice model, we find the justice of "recognition" that involves more than one axis while for some authors it is a true paradigm. This recognition paradigm that has its origins in the phenomenology of consciousness recovers the notion of recognition, as stated by Fraser (2008) of the Hegelian thesis, often considered opposed to liberal individualism.

In a simplified way, we can say that the redistribution paradigm focuses on injustices that have a socioeconomic basis; the recognition paradigm, as we said, is one of the axis of the distribution paradigm which focuses its attention on the injustices primarily interpreted as cultural rooted in social patterns of representation, interpretation, and communication (mainly through the analysis of cultural domination, ethnic, racial, gender differences, sexuality, or generally what happens with other stigmatized groups). Marion Young insists that a redistribution policy that emphasizes the focus on differences also can reinforce injustice, giving more power to dominant groups (Fraser 2008).

From critical social theory, Fraser (2008) and others have advocated the need to integrate in a coherent way redistribution and recognition, understood as primitive and irreducible dimensions but interdependent of social justice with equal impact on sociological approach. Thus, we believe that analyzing the forms of injustice, complaints, and possible actions from the intersection of the two perspectives particularly in relation to the axes of subordination associated with gender and race (considered "bivalent collectivities," "hybrid categories," or "two-dimensional social differentiations") in turn subordinated to the social class inequalities. Moreover, this two-dimensional explanatory approach involves the following aspects: (a) understand the ways that injustice is conveyed, (b) assess the justified claims that are reported, and (c) identify and generate effective solutions in accordance with the normative criterion of participatory parity.

The concern for distributive justice simultaneously with the importance of recognition is a relatively new aspect that some authors link with the era of globalization. The emergence of social movements, the claims of minorities, multiculturalism, and feminist movements in the center of gravity were the ones which forced the recognition of the importance of both aspects of a common problem. The displacement of the national framework for the territorial causes that the thinking about justice transcends national claims requiring a "critical theory of justice in the era of globalization" (Fraser & Honneth, 2003).

They will not have the ability to be heard, to be taken into consideration, and to make the appropriate claims as members who may have enough strength to make their voices be heard, that is, subjects who are not adequately represented in accordance with the procedures that structure public processes of confrontation and decision-making mechanisms, matters concerning the political sphere of justice and representation forms.

From this perspective, what makes a group of people to become subjects of justice is not geographic proximity, but their co-nesting in a common structural or institutional framework, which sets the basic rules that govern their social interaction, "thus setting their life chances as patterns of advantage and disadvantage" (Fraser, 2008: 55).

Cognitive Justice as a Privileged Form of Social Justice

We have referred to the importance of the recognition of *otherness*, the struggle for inequality within the framework of respect for differences that can be done by HE daily practice, its role as a builder of theories that have as a goal social justice within the framework of cognitive justice, and the need to recover critically the category of social relevance and responsibility to rethink the future of the HE.

There are objectives that logically the HE cannot accomplish without appealing to other institutions that would meet the objectives related to the coverage of basic needs in a short and long term. But there is an endogenous aspect, not less, in line with major objectives of social justice that can be addressed within HEIs, and that is the link to cognitive justice as recognition and equi-potency given to the old and new knowledge that has never been able to enter the HEIs and that causes real injustice.

Latin America, overflowing with wealth of this old and new "alternative" knowledge became a prime setting to explore new paths that also lead to regional solutions and dialogue with those who want to work with these institutions.

The real ability to exercise cognitive justice practices is also the way to find its own path, linked to local needs with local responses, consistent in their creation of knowledge (primary function of the HEIs) that departs from real bases, concrete, and also identified by members of the HEIs as an exercise of democracy, which society values.

Higher Education Institutions can and should give priority to recognize the sources of injustice and test solutions in addition to being an example of social innovation and propose to build explanatory theories and looking for a more just society.

About the Commitment of Higher Education and the Concept of Relevance

The inclusion of the key dimension of social justice in developing the concept of relevance involves some debate about the social responsibility of HE. This term, used by the business sector as noted by Dupas, "dilute the public and political references in an attempt to reduce social injustice." These practices are unable to resolve the serious problems of social exclusion and also depoliticize (Dupas, 2005: 121 and 123). But from our perspective, the social responsibility means to produce socially significant knowledge and training professionals with citizen awareness and contribute to the culture and the transformation of reality in which educational institutions are active.

That is why we must rethink the institutions from within, not only from a work of bureaucratic and administrative reorganization but from the deep ongoing reflection on their meaning and their role in the construction of the civilizing process in these new contexts.

The relevance must have a dimension that includes social justice as a dimension that compromises HE and which also permits setting new quality standards. The quality is not understood as an exclusive value, or *for a few* as it was the attempt to redefine it in the 1990s, it needs to recover a social, public commitment to the communities in which educational institutions are inserted. Consequently, the processes of assessment and accreditation in Latin America and the Caribbean should give primacy to uncontested indicators of relevance and social relevance as well as policies and actions that create more equality and prosperity for all (Dias Sobrinho & Goergen, 2006).

Although the social relevance is a misleading category (Naidorf, 2007), our analysis aims to highlight the aspects related to the social function of the university and equal opportunities which potentially have to increase not only the access to higher education level to which we referred but also to enrich society through the specific contribution of the university as a space for creation and dissemination of socially relevant knowledge.

And for higher education to be a practice of freedom, universities must be thought as public goods. And the notion here of public implies four questions, as rightly put by Craig Calhoun (2006): (1) where does the money come from? (2), who governs? (3), who benefits? And (4) how is knowledge produced and circulated?

On the other hand, the thought of Amaryta Sen (1999) concerning social justice is essential to understand the "skills" in the sense of *agency or empowerment*, of individuals introducing an ethical conscience in the economy and a new concept of human development based on freedom. Justice is based at the same time in the coverage of basic needs which are also basic skills that must be met in a short term with other needs or skills that, when absent, also involve injustice in long-term consequences.

Proposals for the Analysis and Reflection on the Relevance of the University

The idea of justice as an essential component of social relevance is necessary to consider the public sense of higher education, despite the pressures posed by the current marketing and its own structures. In this context, it is where a theory of social justice makes sense that takes into account both redistribution and recognition (the inequalities and differences) with an axis in higher education as a privileged arena for attention to both challenges.

Higher education as a public asset		
Relevance of higher education based on Social justice	Distributive justice	(a) Financial, social, and cultural resources (b) Equality of access (c) Equality of survival (d) Equality of output (e) Equality of outcome
	Recognition justice	(a) Curricular flexibility (b) Transfer of knowledge (c) Research and extension (d) Inclusion (e) Collaboration between universities (indigenous, etc.)
	Cognitive justice	Recognition and inclusion of local knowledge (languages, customs, nondominant cultural codes)
	Institutional links	(a) Institutional strengthening (b) Networking (c) Cooperation

Considering the inequality and exclusion as determinants of the tendency of equity and inclusion policies in higher education in the region of Latin America, it is necessary to address the issue with a view *from inside the national higher education systems* to focus the eyes on inclusion policies in higher education institutions, systems of governance, relevance of university programs, mandatory projects, and the need to maintain a high degree of collaboration between HEIs to recognize the different dimensions of the problem such as lack of a common agenda for equity, common policies, and standards but adapted to each context, the implementation of parallel thematic diagnostic activities, and the collaborative forms aimed at achieving social objectives defined by the institutions themselves in dialogue with society. Overcoming inequality and exclusion as a strategy to reach the road to sustainable development of societies is the most urgent and important challenge of our time for countries, and HEIs in LA have a role in this challenge.

It should contribute to institutional strengthening and regional or subregional integration, through skills development, institutional learning, improving of processes, and increasing not only the link with the sectors that can provide additional resources as a counterpart (link to companies) but mainly to increase the links to the most disadvantaged sectors organized most of the time over what should inspire the revision of its function. It will aim to reinforce the actions and activities aimed at promoting linkages and joint activities between universities and with other sectors of the societies to those where the universities provide their specific contribution in terms of achieving more just societies.

Regional and interregional integration oriented to sustainable development and reducing social inequality has been taking various renewed impulses through new forms of social integration supported both by spaces such as MERCOSUR, Latin American goals of exchanges and cooperation, which tend to join forces in a broad-based but possible target of achieving the common good for the majority.

Promoting social cohesion cooperation among universities in Latin America and other parts of the world, from a distant link model of "transplanted recipes" and to others applied vertically, allows creating a space for communication and discussing strategies that promote institutional actions aimed at social development equitable integration and collaboration.

As one of the objectives for the achievement of social equity, expanding access should simultaneously pursue the successful conclusion of the studies, while ensuring that the time spent at university is an ideal opportunity for civic education with social meaning, expanding horizons, creation and recreation of knowledge, respect for differences, and also of social cohesion as mentioned above, i.e., far beyond the individual career to achieve accreditation.

This effort should include appropriate financial and educational support for the students who come from poor and marginalized communities (UNESCO, 1998) in as many positive actions as possible so that it allows at least one common initial base in the access and support for those with unfavorable conditions for the classic courses established by the universities.

The former is a way to redefine previous institutional objective, but at a long term it should not *level from below* in order to be a university best suited to the needs of Latin America, as it is supposed to be.

Among the issues concerning justice and a true recognition, cognitive justice at the university cannot be kept away knowledge that for almost 500 years has been disregarded in the educational systems of Latin America as the Aboriginal habits and traditions and the not Aboriginal, but local, born and developed in this region of the world that has not been considered as valid knowledge to be studied by the educational system in particular and by Latin American culture in general. It has been known as folklore sometimes pejorative or disregarded in their value, while white culture, Western or European culture, was presented as the one to transmit, integrate, and disseminate. A cognitive act of justice to which the education system can contribute at a high degree of impact and success is to recognize in their universities what Boaventura de Sousa Santos called the ecology of knowledge (De Sousa Santos, 2005).

Surely cognitive justice is a form of social justice while also recognizing other cultural codes of the dominant code (Bernstein & Cook-Gumperz, 1973; Bourdieu, 1991), while the HEI as a privileged laboratory for experimentation and institutional and social laboratory recognize other codes being also valid (Fraser 2008).

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Chapter 7

A Grid and Group Explanation of Social Justice: An Example of Why Frameworks Are Helpful in Social Justice Discourse

Edward L. Harris

Social Justice: Ubiquitous Theme but Elusive Meaning

While social justice is increasingly becoming a topic of interest in professional and popular literature, definitions and understandings of social justice remain elusive and vary significantly. Critics often echo the notions of Hayek (1976) who over four decades ago argued that innumerable scholarly battles have been fought over social justice without offering a suitable definition; moreover, "the people who habitually employ the phrase simply do not know themselves what they mean by it, and just use it as an assertion that a claim is justified without giving a reason for it" (p. xi).

One can see the disparities in the various philosophical and ethical underpinnings of social justice. For instance, Rawls (1971/1999, 2003) offers objective standards and draws comprehensively on utilitarian, Lockean, and Kantian ethical theories (Zajda, Majhanovich, & Rust, 2006). Social justice also has religious explanations, such as Judaism's notion of *tikkun olam*, or repairing the world, Buddhism's compassion for all sentient beings, and Christianity's call to help the poor (Mayer, 2007; Sacks, 2007). And still other perspectives frame social justice as a universal concept representing a way to live rather than a concept to be defined (Griffin, 1988, 1990).

One explanation for these disparate views of and approaches to social justice can be found in cultural theory, which describes principals and practices of justice as social constructs. That is, views of social justice are inextricably linked to social contexts within which models of justice make sense to the people involved. Thus, various conceptions of social justice can be interpreted and manifested differently in different settings (Alwy & Schech, 2007; Douglas, 1996). By reformulating the

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question, "What is social justice?" to "What are the constructions of social justice in particular environments?" the concept of social justice can be more aptly fitting as a subject of inquiry.

Cultural Theory and Social Justice

Social justice is inextricably linked to sociocultural life and values. Bankston (2010) posits that on a societal level, contemporary notions of justice stem from cultural perspectives shaped by two societal developments of the last century: mass consumption and human rights advocacy. The Industrial Revolution sparked substantial rise in mass production and consumption, which resulted in concerns over resource scarcity issues for the disadvantaged and ways to improve their circumstances through equitable redistribution. The civil rights movement framed these resource scarcity and redistribution concerns in terms of human rights of underrepresented populations. Bankston explains that the first cultural development "fueled a growing preoccupation with wealth distribution, and the latter provided an energizing myth that animated the redistributive ethic" (p. 165).

On any level, societal or contextual, preferences and practices about the pattern of justice are couched in "cultural relationships and value systems of people belonging to the distinctive groups" (Tansey & O'Riodan, 1999, p. 71). Social anthropologist Mary Douglas (1982/2011) has developed a typology that helps consider the cultural constructs of particular social groups. Her typology of grid and group, also referred to as cultural theory (Thompson, Ellis, & Wildavsky, 1990), brings order to experience and provides a common language to explain behaviors and interactions in social settings. As an added benefit, since social justice has become a global concern, Douglas's theory has been used extensively in international contexts (Ellis, 1996; Fardon, 1999; Douglas, 1996).

In previous publications, I have explained the salient features of cultural theory as well as examined its usefulness in a variety of domestic and international educational contexts (Harris, 1995, 2005, 2006). As clarified in many of these publications, Douglas's thoughts on the theory gradually altered over the years. For instance, being heavily influenced by Levi-Strauss and Durkheim, Douglas's earlier versions of grid and group had a decisive structuralist tone and attempted to analyze behavior in terms of definable components, signs, or structures. She always, however, remained adamant that her theory was not a linear determinant, as social interaction is highly variable and difficult to predict. Over time, as Spickard (1989) notes, she made a philosophical move "from structuralism to ethnomethodology (p. 152)," which attempts to understand how people make sense of, explain, and carry out day-to-day life (Patton, 2002).

Cultural theory offers explanations of fairness, justice, and other values in specific social contexts (Thompson et al. 1990). According to the typology, there are neither innumerable contextual meanings of social justice nor vast possibilities that characterize cultural experience. Rather, there are four, and only four, distinctive social contexts in which one may find him or herself and only two dimensions, grid and group, which define each of those four prototypes as well as explain contextual meanings (Harris, 2005, 2006).

Grid Dynamics

In Douglas's frame, grid refers to the degree to which individual autonomy and actions are constrained within a social system by compulsory role and role prescriptions. For instance, in some schools, prescribed bureaucratic rules restrain personal freedoms, and in other schools, nominal regulations allow for autonomy in most educational processes. Also, in any setting, ideas and practices of fairness related to compensation, distribution of goods, and perks of the job are often related to implicit or explicit rules, individual roles, and relative status in the organization (Harris, 2005, 2006).

Grid strength can be plotted on a continuum of weak to strong. At the weak end of the continuum, few role distinctions exist, few institutional rules restrain autonomy, and individuals are valued for their skills, behaviors, and abilities. In weak-grid contexts, members are neither isolated nor insulated from each other by respective job responsibilities or departmental units. In these environments, leadership status is not considered superior to other roles. Rather, he or she is regarded as one whose skills, abilities, and personal history are more in tune with administration or organizational leadership than with other roles. In many cases in weak-grid schools, the school leader will emerge from the midst of the teaching ranks as one considered the best leader among equals.

At the strong end of the grid continuum, role and rule dominate patterns of labor, and an explicit set of institutional regulations order personal interactions. In strong-grid schools, teachers typically are not at liberty to select their own curriculum and textbooks, and many decisions are made by upper administration. Strong-grid environments also contain many role distinctions at the teaching and staff levels, with proportionately fewer, yet more prestigious, distinctions further up the organizational ladder.

Understanding Power Structures, Social Justice, and Grid

Organizations use power and authority to direct behavior of their members as well as to control the level and type of involvement of their participants. In the most basic sense, two power derivations, positional and personal, define leadership practice in an organization. Positional power refers to influence and authority derived from a particular organizational office, status, or rank. Personal power refers to influence and authority derived from subordinates in an organization and achieved over time.

Grid is closely akin to these concepts of power and authority. In strong-grid environments, authority structures are highly centralized and power is typically positional. School leaders are granted more administrative power than teachers because of the position they hold in the school. In weak-grid schools, authority is decentralized and administrative power is typically personal, earned over time, and based on how they are viewed in relationship with other school members.

While inequalities can be found in both strong- and weak-grid settings, they are often more evident in strong-grid. For example, in a classic strong-grid school system, the superintendent or headmaster is at the pinnacle of a regulated chain of command. Significant power and authority is delegated by a governing board of directors to this leader and from him or her to those in lower echelons.

Organizational units, whether academic departments or grade levels, can be virtually obscured in the midst of complex hierarchy and often have specific communication procedures that often insulate them from other layers and positions. Teacher autonomy is often hampered by rules regulating their position and activities, and they generally have little voice in most areas of the educational process. One of their few opportunities for self-governance may be in the refuge of their classroom. However, even there they may be under the close scrutiny of authoritative superiors (Harris, 2005, 2006).

Much like Rawls' (1999) conception of social contract, whereby people can either freely agree on principles of social cooperation that benefit everyone or choose principles that promote inequities, cultural theory contends that rules can be both the cause and cure for social injustice. In institutions where role and rule dominate, perceptions and practices of justice and fairness vary explicitly among the hierarchical layers and are often dependent upon equity-based allocations that correspond with role and status (Lansberg, 2006). Upper levels may view the organization as just and fair, as they may be insulated from unfair practices that may occur in subordinate rungs. Lower-level members' perceptions of fairness depend upon their respective pay, and often they envy those above them whose pay is more for apparently less work. To some degree, this is akin to Adams' (1965) equity theory, which hypothesizes that in any exchange, fairness is dependent on the extent to which individuals consider their rewards to be in concert with their role, service, and contribution.

While injustices may be more vividly apparent in strong-grid environments, they exist, nonetheless, in weak-grid contexts as well. For example, weak-grid contexts are extremely competitive and promote a survival-of-the-fittest mentality. There are always those less strong or less competitive, and they often experience injustices through lack of participation or lack of resources. Passively allowing the strong to improvise self-serving principles of social justice can pose inequities for the less strong. Some of the salient features of grid can be seen in Fig. 7.1.

Group Dynamics

In cultural theory, the notion of group refers to the holistic social incorporation and degree of commitment to the larger social unit. Like grid, group can be plotted on a continuum from weak to strong.

Weak-group environments place little emphasis on group-focused activities and relationships. Members of social and working subgroups tend to focus on

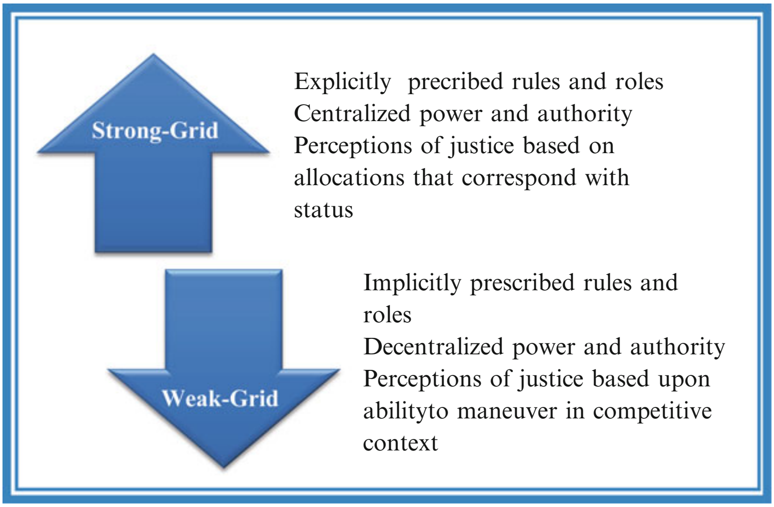
Strong-Grid
Explicitly precribed rules and roles
Centralized power and authority
Perceptions of justice based on allocations that correspond with status
Weak-Grid
Implicitly prescribed rules and roles
Decentralized power and authority
Perceptions of justice based upon abilityto maneuver in competitive context

Fig. 7.1 Grid dynamics and social justice

short-term activities rather than long-term corporate objectives, and group allegiance is minimal. The ethical system most embodied in these contexts is virtue ethics, which emphasizes internal moral codes and strength of character over traditional norms. An example of weak-group can be seen in schools that do not have entrenched traditions or where the social system is in constant flux due to recurring teacher or administrator turnover. In these settings, individual interests override what few corporate goals exist.

In strong-group social settings, explicit pressures influence group relationships, and members rely on the larger unit for social support. Collective survival is more important than individual survival, and insider-outsider norms regulate group membership. Private schools provide good illustrations of insider-outsider membership criteria with their explicit admission requirements. However, there are also many public schools with implicit criteria for group membership through such features as exclusive neighborhood locations. For instance, some public schools are located in elite, influential neighborhoods. While open attendance laws may allow any student to attend the district schools, generally only those who live in the elite neighborhoods actually do attend. There are, in effect, de facto membership criteria for the school because the poorer families typically cannot or will not transport their children to those schools.

Another example of strong-group can be seen in Rawl's (1999) use of utilitarianism ethics, which hypothesizes that in an array of options, the best choice is the alternative that achieves the greater good for the most people. Similarly, in strong-group contexts, group goals override individual goals, activities and actions are directed toward a common purpose, and whatever is best for the group is ultimately best for all (Harris, 2005).

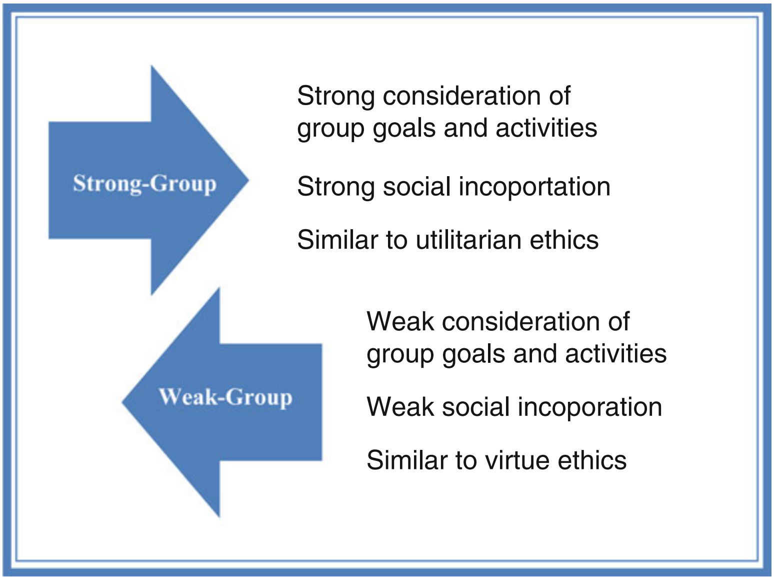
Strong-Group
Strong consideration of group goals and activities
Strong social incoportation
Similar to utilitarian ethics
Weak-Group
Weak consideration of group goals and activities
Weak social incoporation
Similar to virtue ethics

Fig. 7.2 Group dynamics and social justice

Strong-group can also be found in institutions where allegiance, entrenched traditions, and norms are carefully preserved and passed from generation to generation. In terms of social fairness, these norms can be either just or unjust. Like many countries, the United States has social justice values and practices we can proudly extol, such as public education and religious freedom. We also have some ideologies that mar our nation's history, such as slavery of African Americans and exploitation of Native Americans. Due to strong-group mindsets, such social injustices were once tolerated and traditionally perpetuated from generation to generation. Even after the regulated abolishment of such practices, strong-group repercussions of racism and social prejudice as well as inequitable opportunities for underrepresented groups still plague our society (Butler, 2010). Figure 7.2 depicts some pertinent features on the group continuum.

Social Games and Social Justice

Grid and group dynamics are simultaneously at work in any social setting. When grid and group coalesce over time, certain themes and dominant patterns of thought and behavior tend to define a particular setting. These patterns are, in effect, prevailing mindsets that influence the entire cultural environment.

While Douglas referred to these prevailing mindsets as cultural bias (Douglas, 1982/2011), Lingenfelter (1996) dubs them "social games" (p. 24), because they define the character of social life people carry out or "play" in a particular setting.

In the organizational theory literature, these prevailing mindsets are similar to Deal and Kennedy's (2000) "rules of the game, the way things are done around here" (p. 4). Douglas and Lingenfelter add specific terminology to the organizational cultural vernacular, as they describe different prototypes of "the way things are done around here" and explain that each social game embraces a particular notion about justice and other dimensions of social value.

In Douglas's typology, there is not an endless number of prototypical mindsets that characterize contextual meanings and practices of social justice. Rather, there are four prototypes, which are defined by the four possible ways of grid and group life (Harris, 2005).

Individualist (Weak-Grid, Weak-Group) Environments and Individualism

Due to lack of imposed formal rules and traditions, individualist environments promote unconstrained relationships and individual experiences. Role status and rewards are competitive and contingent upon temporal standards, few insider-outsider screens exist, and little value is placed on group goals or social incorporation. The predominant social game in this environment is "individualism," which encourages members to make the most of individual opportunities, seek risks that result in personal gain, as well as be competitive and proactive in securing resources and charting their life goals.

Bureaucratic (Strong-Grid, Weak-Group) Environments and Authoritarianism

Bureaucratic contexts offer minimal individual autonomy due to explicit classifying criteria, which emphasize such factors as division of labor and specialization, ethnicity, gender, or family heritage. Roles are fully defined and without ambiguity. Meaningful relationships and life-support networks are often found outside of the group, and like weak-group individualism, minimal value is placed on group goals and incorporation. The social game in this environment is "authoritarianism," which often promotes limited opportunity for advancement and opportunity, compliance to rules and procedures, lack of control of group goals and rewards, and autocratic rule by administrators.

Corporate (Strong-Grid, Strong-Group) Environments and Hierarchy

In corporate contexts, group goals take priority over individual goals. Labor, behavior, and interpersonal relationships are influenced by group norms and social incorporation. Roles and responsibilities are fixed within a stratified chain of command.

Upper management roles are limited to a small number of experts, and numerous role distinctions are dispersed throughout the middle and bottom rungs of the pecking order. The social game valued in this environment is “hierarchy,” because group members understand that in a hierarchical system, what is good for the corporation is good for the individual. In hierarchical schools, central-office administration, site administration, teachers, students, and parents work cohesively in an integrated system for the benefit of the whole. Opportunities and risks are shared by all, but levels of reward and resource allocation are dependent upon placement in the hierarchy.

Collectivist (Weak-Grid, Strong-Group) Environments and Egalitarianism

Collectivist contexts have many of the strong-group features of corporate hierarchy, including emphasis on group goals and social incorporation. However, the weak-grid aspect allows for more equitable and many fewer role distinctions. Weak-grid also makes role status competitive, yet due to strong-group influences, rules for status are more stable than in individualist societies. The social game of collectivists is “egalitarianism,” which places a high value on unity, equal distribution of resources, suspicion of those outside the community who may want to help, conformity to collective norms, as well as rejection of mindsets associated with strong-grid authoritarianism and hierarchy.

A *kibbutz* illustrates egalitarian mindsets of justice and equity, for in this kind of Israeli community, collectively ownership is valued, labor compensation is in equitable distribution of goods and services, and most member needs are met through community affiliation. Figure 7.3 categorizes the four social games with their respective grid and group environments.

Social justice implications for the four grid and group prototypes are overt, especially in terms of economic distribution, power, and prestige, which often define fairness and social advantage within social hierarchy. In discussing various social disparities and injustices particularly in Kenya and in general, throughout the world, Alwy and Schech (2007) note that levels of social benefits are determined by inherent status in almost any social structure. Examples include socioeconomic groups, racial/ethnic groups, or groups defined by gender, sexual orientation, age, and other characteristics. In essence, social advantages and disadvantages are “distributed along these lines virtually everywhere in the world” (p. 133).

As previously stated, cultural theory posits that social game prototypes originate in the symbiotic interaction of grid and group. Thompson et al. (1990) state that these consequent cultural games dramatically effect preferences and practices in matters such as economic wealth, resource scarcity, blame, envy, and other dimensions of social value “that any social theory worth its salt should address” (p. 59). The following are brief descriptions of some of these social values as well as their importance to social justice.

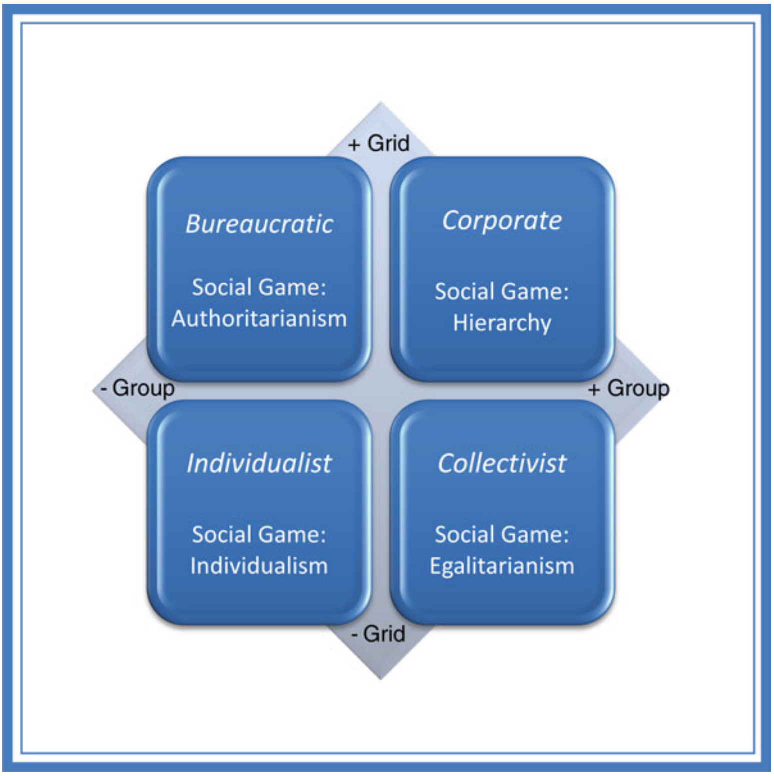
+ Grid
Bureaucratic
Social Game: Authoritarianism
Corporate
Social Game: Hierarchy
- Group
+ Group
Individualist
Social Game: Individualism
Collectivist
Social Game: Egalitarianism
- Grid

Fig. 7.3 The four environments and their respective social games

Resource Scarcity and Abundance

In a world of limited or scarce resources, fair distribution of those available resources to meet seemingly unlimited societal needs is at the heart of twenty-first-century social justice as well as authentic educational reform (Crank, 2003; Homer-Dixon, 1999). Resources can be economic, natural, or human, as in labor resources. In demonstrating the connection of resources and social justice, Bankston (2010) weaves two complementary threads of thought. First, resource scarcity is often associated with the have-nots, and one aspect of social justice is the equitable redistribution of available resources to improve their situation. Second, this redistribution is often shaped in terms of rights of the disadvantaged, who along with special interest groups lay claims on the rest of society to correct inequities.

An example of this can be seen in the recent debates in the United States regarding the relative inequitable health-care resources. The argument moved rather quickly from a discussion of the inequities to the right of every American citizen to have health care. Bankston's notions are also demonstrated in Darling-Hammond's (2010) call to systematically address education's inequitable human resource problem by creating inclusive and equitable infrastructures that facilitate teacher development for all student communities.

Cultural theory illumines these discussions, as each social game embraces certain values about resource scarcity. Individualists reject the idea of resource scarcity and see resources as raw materials to be competed for in an open system. Authoritarians are fatalistic in their view of resources, viewing scarcity as part of life in an environment which one has little control.

Hierarchists typically view scarcity as positive, as it can be a source for power, control, and group gain. For egalitarians, the depletion of resources is the fault of those outside their enclave, and any other distribution other than equitable allocation is unacceptable. To summarize the varying scarcity social games, the individualist's aim is to use up the raw material while it is still worth something, the authoritarian tries to preserve what little he or she has, the hierarchist seeks administrative control, and the egalitarian tries to make natural resources last for eternity (Thompson et al., 1990).

Blame

Folger and Cropanzano's (2001) fairness theory illustrates the relationship of blame and social justice by explaining that when people in a particular group declare an instance of unjust or unfair treatment, someone must be accountable for that action or inaction that causes the injustice. Conversely, "if no one is to blame, there is no social injustice, (thus), the process of accountability, or how another social entity comes to be considered blameworthy is fundamental to justice" (p. 1).

Individualists often attribute blame for social inequities on the victims themselves. Everyone should be able to pick themselves up by the bootstraps and rise above their circumstances. If not, it's because of bad luck, personal incompetence, or a combination thereof.

Authoritarians have the ubiquitous bureaucracy itself to blame. Blame can also be credited to destiny or fate, as illustrated in a caste system. In a stratified caste system, strong-grid rules regulate life in each layer of social order, which is established and preserved by the higher laws of providence. Thompson and his coauthors (1990) explain that, unlike the strong-group populace, authoritarians do not have a collective to hold responsible. Rather, blame is "diffused onto the amorphous entity, 'fate'" (p. 60).

Hierarchists are quite adept at blame shedding, passing off the culpability of injustice among the various hidden layers of corporate structure. For egalitarians, the ever-present outside system, "the man," is to blame for the cause and perpetuation of injustices (Douglas, 1994).

Envy

Like blame, envy plays a vital role in conceptualizing social justice (Douglas, 1996). Syndicated columnist Richard Reeves (2003) refers to envy as a friend to social progress and "the midwife of social justice… one man's envy is another's sense of justice" (para. 3).

Although envy is often associated with the "have-nots" who desire what the "haves" possess, the lower echelons of society do not hold a monopoly on this vice. Fonagy (2008) notes, for example, that the privileged can also be carriers of unresolved envious feelings and are often fearful of losing their prestige.

Individualists embrace envy, for it spurs ambition and competition, which in their view are vital to a progressive society. Simple subsistence is not for them, as their way of life is dependent upon getting ahead and expanding their wealth. For authoritarians, those in the lower rungs of social stratification often envy those in the upper, but are ever aware that rather than human action, fate and just plain luck are the primary culprits of social predicament.

In hierarchical settings, stratification within a pecking order often creates a system where those in superior positions desire to maintain their status and those who are in inferior positions desire to improve their condition by moving up the ladder. For those in authority, controlling envy is important, because the absence of envy could possibly place long-held norms and overall group control in jeopardy.

In hierarchical mindsets, envy is deflected by arguing for the appropriateness of role specializations. Experts at each level of specialization know what is best, and the elite, the top of the hierarchical structure, can live somewhat ostentatiously, for they know what is best for the entire group. In contrast to the ostentatious elite hierarchists and ambitious individualists, egalitarians prefer the uncomplicated life and unpretentious housing and clothing. In this manner of living, they endeavor to control envy by minimizing role distinctions (de Pottel, 2010).

Economic Wealth

Wealth is a useful notion when discussing social justice. Some scholars actually define social justice primarily in terms of economy and power (Zajda, Majhanovich, & Rust, 2006). In terms of cultural theory, individualists seek to create new wealth through ambition and capitalism. For authoritarians, the higher the status in the bureaucracy, the more wealth is available. All hierarchists can grow economically if the corporations itself grows. As for egalitarians, equal distribution is more important than individual growth (Douglas & Waldavsky, 1982). Table 7.1 highlights the various social games and their corresponding social justice constructs.

Social Justice and the Production and Distribution

Central to the interrelationship of economic wealth and social justice are concepts of production and distribution. While Reaves posits that envy is social justice's midwife, Hillebrand (2011) argues that economic wealth is its battlefield. In terms of production and distribution, we Westerners often advocate from a market mindset heavily influenced by the industrial revolution. As such, we can miss the mark of helping our fellow global citizens adapt principles and practices of justice to their

Table 7.1 Social justice factors and social games

	Social justice factor			
Social games	Resource scarcity	Blame	Envy	Economic wealth
Individualists	Competition for resources is cure for scarcity	Bad luck, personal incompetence, or both	Envy spurs ambition and competition	Seek to create new wealth; innovation in individual profit
Authoritarians	Scarcity is part of life; individual preservation of resources is the best one can do	Blame and give credit to fate, destiny	Good luck and bad luck are main culprits	Wealth is for those at top
Hierarchists	Scarcity and opportunity for control, power, and corporate gain	Shed blame to hidden layers of corporate structure	Institutionalized inequalities control envy	Flow of wealth to top for corporate investment and growth
Egalitarians	Collective preservation and equal distribution of resources	"External system" or "the man" is to blame for injustices	Modest living controls internal envy	Equal distribution is more important than individual growth

environments, because they may approach justice from completely different production and distribution paradigms. In a sense, without understanding varied economic cultural nuances of a context, many well-intentioned advocates could propagate a form of social justice colonialism as well as create inequitable relationships both inside and outside indigenous populations.

Economic anthropologists have found it useful to define economic systems into three broad categories: industrial market, peasant agriculture and commerce, and tribal subsistence. Relying on Douglas's typology, Lingenfelter (1996) demonstrates the usefulness of understanding and explaining the expression of cultural bias in each of the three systems. He states that the three categories of economic systems are important, but "they oversimplify significant social distinctions that occur in each level of economic complexity" (p. 32). The discussion that follows builds on Lingenfelter's argument.

An industrial market economy is a consumer-based system, which relies heavily on complex technologies that help supply consumers' demands, choices, and consumption. This system is comprised of businesses that purchase goods and services for the production of other goods and services that are subsequently sold, leased, or supplied to others. In grid and group terms, industrial market systems have specific social justice dynamics. For example, authoritarians construct complex divisions of labor and specialization that dominate the workforce. Individualists seek to profit from abundant personal investment capital, which is more readily available in these systems than in others. Domestic egalitarian human rights organizations work for fair distribution or goods and services, and large-scale production by corporations ensures a ready supply of those commodities. The United States and other capitalist societies fall in this category.

The study of peasant economies is most commonly associated with Russian economist Alexander Chayanov's (1927/1991) theory on the topic. Peasant economies are agriculturally and subsistence based. Either the family unit or family co-op is the primary unit of production. Authoritarian mindsets are seen in very simple divisions of labor, which are based on one's ability to farm or make crafts. Peasant tenants often farm property owned by much wealthier landowners. As Lingenfelter (1996) emphasizes, "craft specialization and surplus agriculture production feed a wider commercial economy, in which the rulers enhance their personal lifestyle and splendor of their kingdom or states" (p. 32). Families range in size, from multigenerational extended families to single-unit parent–child households. In peasant economies, individualists possess little personal investment capital, and social justice advocacy often comes from egalitarian nongovernment organizations (NGOs). Examples of peasant economies can be found in almost every developing country.

Tribal subsistence economies are characterized by basic technology, simple division of labor, as well as small-scale units of production. The social unit of production, distribution, and consumption is limited to the family. While all four social games are present in tribal subsistent economies, they are much more integrated into the fabric of society, and it is more difficult to differentiate one from the other. These family-based economic systems have little or no investment capital, and barter is often the medium of exchange. Custom and ritual are important factors in making choices about egalitarian and equitable exchanges of goods and services. Justice norms are derived from tradition, and like peasant societies, any additional social justice advocacy comes from NGOs. Examples of this type of system include Aborigines, most African tribes, and other tribal systems.

Social game prototypes provide opportunities to explain the variation in social games and consequent social justice implications in each of the three economic levels. In spite of economic differences, the four social games are dynamically manifested in each system and provide a realistic basis for just and fair resource distribution.

Social Justice, Cultural Theory, and Implications for Research, Theory, and Practice

Implications for Theory

Douglas (1993) explains that those who seek to explain social justice via "virtues and vices, *ad hoc*, without a systematic theory…are naïve" (p. 501). Her typology helps in understanding contextual meanings and manifestations. It provides a classifying matrix that allows for explaining contextual values, beliefs, and behaviors as well as explains the interrelationship among these variables and social justice. Further, it offers a vocabulary to discuss and explain contextual nuances.

However, while grid and group typology is extremely useful, I hasten to mention that it is not the string theory or Holy Grail of frameworks. Categorizing can be misleading. Grid and group analysis should not be viewed as a rigid schema for classification, but rather one means to explain the dynamics and interdependence of social interaction. A theoretical frame, *any* theoretical frame, should not be viewed as a panacea for all predicaments, but rather, to provide a lens to view the world and bring multifaceted concepts into focus. As with any lens, a theoretical frame magnifies as well as alters sensory perceptions.

Nonetheless, as Douglas reminds above, theories like grid and group are extremely useful in explaining social justice. Cultural theory has parallels and offers a complementary addition to other useful theories for understanding human behavior with which educators may be familiar with. Examples of these are the following:

1. Critical theories, which are diverse approaches that have been a primary resource for scholars and practitioners concerned with social justice. Critical theories adopt a critical orientation toward processes and practices in which power and oppression are enacted, seeking to ask questions about common practices, to raise consciousness about inequities, to identify and interrupt exploitation, and to contribute to the transformation of society. Specific forms of critical theory include critical pedagogy, critical race theory, queer theory, and some forms of feminist, poststructuralist, and postcolonial theory.
2. Feminist approaches, which are directly concerned with developing knowledge that leads to social change (Bailey, 2007). These assorted theories represent a wide range of approaches concerned with social critique and social justice for the disenfranchised, including:
    (a) Liberal feminism, which focuses on policy, education, and law as vehicles for achieving equity
    (b) Critical race feminism, which focuses on the intersectionality of race/gender
    (c) Poststructuralist feminism, which focuses on language, notions of subjectivity, and other equity factors
3. Social system theories, which view organizations as complex social systems. One example is Getzels-Guba's model, which portrays cultural meaning, roles, expectations, and behavior through the interaction of the personal (idiographic) and organizational (nomothetic) dimensions of a cultural context (Getzels & Guba, 1957; Hoy & Miskel, 2008). This model can help in understanding how organizational role expectations and rules of social justice behaviors can over time become institutionalized.

Implications for Practice

Bogotch and his associates (2008) posit that for successful twenty-first-century educational practice, social justice requires innovative leadership. On international, national, and institutional levels, cultural theory can help educators appropriately adapt leadership practices to varied environments as well as contextualize pertinent social justice strategies to those environments. Rather than passively conforming to existing circumstances or aggressively imposing principles that are contextually incompatible, adaptive leadership strategies can proactively and positively make needed societal changes.

For instance, one important leadership task of the twenty-first century is to promote safe, orderly, and equitable learning environments. It is useful to know that there are not enumerable social environments in which one must be aware in order to effectively contextualize social justice values. Knowledge of the different social games can help educators resolve conflicts and promote safe and fair learning environments.

In understanding prevailing social mindsets, educators can identify roles and relationships in a particular setting, understand how those roles and relationships affect social justice views, as well as explain why members engage in and prefer particular activities. I have found that many school leaders identify with the explanations of how roles and rules affect individual autonomy and how collective participation is deemed either essential or marginal to effective school improvement. The structure and vernacular inherent in the theory help educators recognize and clarify the dissonance, complexity, and practicality of everyday school life (Harris, 2006).

Another complex issue twenty-first-century educators face is power and resource inequities. Smith (2010) warns that those with less power should be considered at risk for injustice. An example of this can be seen in variations of voice in policy development activities. Those with minimal voice often have little influence and power in policy formation and decision-making processes. Those with more voice have more power to make significant societal changes and see those changes through completion, while those with lesser authority must live with whatever those developments and decisions may be. History reveals that not only injustices take place but also abject, inhumane cruelty can occur to those with lesser power and influence. Thus, those with inherently more decision-making authority must be more mindful of the have-nots and take proactive measures to empower them, as well as include them and their views in policy development processes. Also, in a particular setting, understanding the interrelationship of such social justice values as scarcity and power, blame and envy can help leaders to articulate power relations and propose context appropriate solutions.

On a global level, approximately three billion people live on less than $2.50 a day, over 55,000 die daily due to hunger as well as other diseases due to resource scarcity, and furthermore, many of these global citizens do not have the power base to rise above their conditions. Education has an important role in addressing these issues, and cultural theory can help leaders collaborate with other social sectors to reduce these power and resource inequities. For example, regarding resource inequity, cultural theory indicates that individualism's emphasis on personal rights and competition, authoritarianism's fatalistic notions of allocation and distribution, hierarchy's views on control and elitism, and egalitarian's notions of collective preservation and equitable distribution are simultaneously and dynamically at work in any society.

Cultural theory helps focus social justice interactions on viewpoints of both contributor and recipient. Focusing on systemic practices creates modes of operation that are ecologically appropriate as well as logically sound for all stakeholders. Thus, in understanding cultural prototypes, all parties can be in concert with such concepts as Deal and Kennedy's (2000) notion of the way things are done around here or and in Rawl's (2003) idea of social cooperation for cultural sustainability.

Implications for Research

In cultural theory, the unit of analysis can be exceedingly broad or extremely narrow. Grid and group analysis has been used to explain a wide variety of perspectives – from American political cultures to primitive communities and from internationally based university departments to individual preferences (Ellis, 1996; Fardon, 1999; Harris, 2005). In sum, it has the versatility to aid researchers in understanding either an expansive collection of individuals (e.g., a Ministry of Education or the University Council for Educational Administration), a single unit (e.g., school site, department, or task force), or one individual's social preference.

This adaptability allows for a wide array of contextual exploration, yet offers specific language to explain multiple variations. For example, researchers will likely find varying aspects of social justice being practiced at different times and in different educational contexts. However, this variation has underlying structures, which we can study, compare with other structures, and formulate specific applications for context-specific school improvement. These variations and applications are not as copious as the potential number of units of analysis. Rather, they can be narrowed and focused to the four grid and group prototypes. The frame has been used to research environmental and climate issues, risk perceptions, US and international educational environments, as well as policy development (Harris, 2006).

Cultural theory allows leaders to understand how contextual meanings are uniquely constructed and transformed as well as comprehend the interrelationships among cultural members and their environment. As mentioned above, by formulating the basic question, "What are the constructions of social justice in particular environments?" the concept of social justice can be suitably considered as a subject of inquiry.

Concluding Thoughts

Social justice is a ubiquitous concept with an elusive meaning. In some ways, Hayek was correct in stating that battles have been fought over social justice without offering a suitable definition for the concept. However, there is a reason for social justice's anomalous quality. We live in a pluralistic global community. Even in 1948, the emerging global community saw the need to draft some type of social justice document, which is referred to as the Universal Declaration of Human Rights and states in part that "the inherent dignity (of all people) is the foundation of freedom, justice and peace in the world…."

Douglas (1993) is the first to point out the futility in attempting to arrive at one theory of justice that addresses this noble goal or "describes the person, or the citizen, in terms that will be agreed" (p. 501). While in theory, research, and practice the dimensions of grid and group are continuous, interactive, and symbiotic, as well as extremely useful in explaining social justice, social justice is larger than life. Because like education, social justice not only shapes society but comprises the very form of society, educational leaders will have much to do throughout the twenty-first century.

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Chapter 8
Who Among Us May Be Literate? Closing the Gap Between Literacy and Diversity

Charles Dukes and Kavin Ming

The world has become increasingly more global, and with this globalization has come the demand for basic human rights (Basok, Ilcan, & Noonan, 2006). In spite of this expectation, nearly one in five adults worldwide is illiterate, and more than one in four are illiterate in the developing world (Andersen & Kooij, 2007). In 24 nations, the adult literacy rate is under 50 % (Maddox, 2008). In the United States, one of the contributing factors to this worldwide illiteracy rate is the failure of students to complete high school. According to a 2011 report by the United States Department of Education's National Center for Education Statistics (NCES), in October 2009, approximately 3.0 million 16- through 24-year-olds in the United States were not enrolled in high school and had not earned a high school diploma or alternative credential (Chapman, Laird, Ifill, & KewalRamani, 2011). In dissecting this number along race lines, the Asian/Pacific Islander dropout rate was 3.4 %, the White dropout rate was 5.2 %, the Black dropout rate was 9.3 %, and the Hispanic dropout rate was 17.6 %. While dropping out of high school does not necessarily indicate illiteracy, at minimum, a high school diploma provides foundational reading, writing, and numeracy skills that are necessary for a meaningful future, and when 3.0 million school-aged children fail to access these foundational skills, it leads to a diminished way of living.

Within the context of this heightened globalization, imagine a world without racism, poverty, or injustices of any kind. Might this world be ideal and for whom? Does the absence of injustice constitute a just society? Perhaps social justice for all

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requires more than the absence of injustice. Conceivably, it is not the absence or elimination of particular wrongs but the conceptualization and promotion of just acts that leads to a just society. This thought experiment is intended to illustrate the illusive nature of social justice and highlight the difficulty associated with defining its true nature. The structure of and efforts to create a just society have been contemplated for years, and in spite of classic commentary on the subject, there is still much debate about how such a feat might be accomplished (see Rawls, 1971 and Skinner, 1971 for two contrasting views on the construction of just societies). In one sense, the meaning of social justice may seem relatively straightforward, with deference to civil rights and fulfillment of basic needs. For example, "respect for human rights and identity," (Marshall & Oliva, 2009, p. 3) could easily imply a great many goals worthy of pursuit. Similarly, Brundrett and Anderson de Cuevas (2008) argue for the implementation of efforts that will ultimately "ameliorate current conditions for marginalized groups" (p. 256), ideally resulting in the creation of authentic opportunities for those groups who have been ostracized by mainstream society. Whether social justice is defined as efforts to eradicate conditions impeding some members of society from realizing a quality of life (Barry, 2005) or as a justifiable mission to redistribute resources, taking from the more privileged and giving to the less privileged (Riddell et al., 2005), a simple definition is difficult and seemingly inappropriate.

The complexity of social justice is most likely better understood not as a concept with one singular meaning, but instead as a concept with multiple meanings. We suggest social justice be understood as both a noun—a *disposition* in which the injustices of society are best categorized as philosophical constructs used to characterize the shortcomings of an unjust society —and a verb, a *process* manifest in the creation of public policy, economic restructuring, mass education efforts, and the like. This distinction may somewhat complicate any definition offered for social justice, as most people would prefer a much simpler distinction. Humans are pattern seeking and in many cases appreciate clear distinctions that can be made without confusing gradations or double meanings (Ehrlich, 2000). Similar to discussions—read as raging debates—about nature-nurture, there is no easy resolution to issues that have such far-reaching implications for the human condition. Also similar to the nature-nurture debates, this characterization of social justice may be more easily understood as a compromise of sorts that declares no side a victor, but rather claims a partial victory for both sides, lending itself not to a single interpretation but rather a gradient that requires serious consideration of both disposition and process, applied based on stated goals, population in question, as well as geographic, economic, and social conditions. Placing social justice at the front and center of an informed agenda for society and more specifically institutions within society (e.g., schools) will require a deep appreciation for the distinction between and integration of social justice as a noun and social justice as a verb. A discussion about a social justice agenda that is appropriate for all aspects of society is beyond the scope of this chapter, but we believe that the notions expressed about social justice have applicability beyond schools and serve serious consideration for all aspects of society, as the marginalization and outright denial of basic human rights to any member of society is unacceptable.

An attempt to create a viable framework from which to define social justice has been proposed previously. Bell McKenzie and colleagues (2008) argued for a "non-essentialized" conceptualization of social justice in which the context is paramount to setting a socially just agenda in schools. These authors suggest that social justice be linked to academic achievement, critical consciousness, and inclusive practices. The interesting point here is that the proposed social justice agenda actually uses the term as both noun and verb. This is not inherently a problem, but without a clear distinction made between what should be understood as conceptual and what should be understood as action, it is possible that neither dispositions nor processes will be well developed or understood. Thus, defining social justice with a simple single meaning is not preferable or in our estimation helpful. In contrast, it is helpful to use a multiple-meaning framework and distinguish between social justice as a noun and as a verb. This distinction is an effective way in which to sift through the many commentaries on social justice. The literature on social justice is quite vast and includes perspectives from a number of different scholars representing a great many disciplines. The unifying factor seems to be the consideration of the human condition and how this condition can be improved for those most in need. This is often balanced with the notion that a just society is most desirable for all members of society. Clearly, any pursuit toward such a society requires that attention be paid to virtually every aspect of the society. For purposes here, the focus will be on education in general and schools in particular, as educating children is one of the fundamental services provided to the public and is almost always a point of contention with regard to setting a social justice agenda (Kauffman & Hung, 2009; Rioux & Pinto, 2010). Education and social justice are in no way estranged and better described as intimately involved. In the United States and other industrialized countries as well, a number of efforts have been and continue to be enacted to ensure adequate education for most children (Williams, 2010). For the remainder of the chapter, we will use the distinction of social justice as noun and verb and focus on specific events within schools to help illustrate a stark example of the failures that occur far too often to specific segment of society, those with disabilities. Clearly, this discussion only includes a small portion of the picture, but we believe that it provides a more than adequate example that allows for contemplation about a social justice using a unique framework and hopefully a socially just informed agenda for schools. The relationship between education and social justice will be described next.

Social Justice as a Collective Responsibility

The noun and verb distinction is helpful but only provides a portion of the framework for understanding social justice. There are a number of factors that can be considered critical to a social justice agenda. The claim here is that education for all children regardless of ability, including children with the most severe disabilities, is essential to any social justice agenda and embodies the true nature of social justice as a noun (social justice as a verb defining actions to implement an agenda will be discussed later). In the United States, the Federal Government sparked a movement toward education for all with the passage of legislation in 1974 (Education for All Handicapped Children Education Act, P.L. 94-142), requiring that children with disabilities in the United States have access to a free and appropriate public education (FAPE). This legislation is not the only example but serves as a starting point in time that spawned a fundamental shift in thinking about a more inclusive definition of diversity (at least in the United States, clearly this movement cannot be credited as the sole catalyst for similar movements in other industrialized nations) that includes all children. Governments around the world and international organizations have issued proclamations about the education of children with disabilities (e.g., World Health Organization (WHO) and the United Nations Education, Scientific and Cultural Organization (UNESCO); see Polat (2011) for a description of these proclamations and related efforts). These various pieces of legislation and proclamations have acted as a catalyst for the promotion of inclusive education, and although the progression of events is not exactly linear, there is a recognizable sequence: legislation to inclusive education to a social justice agenda. This progression is tentative, as perhaps perceived injustices in general inspired an examination of schools and inspired change. Each aspect of the previously described progression probably acts a feedback loop in which each factor influences the other, and it may be difficult, if not impossible, to decipher where the progression actually begins. Whatever the case, caution is in order, as much more time is spent espousing a "social justice as a noun" agenda that seems heavy on dispositions that should be adopted to the exclusion of actions necessary to create schools in which all children have authentic opportunities to benefit from a comprehensive education.

In the United States, parallels are often drawn between efforts to racially integrate schools and efforts to include children with disabilities. While this comparison is not inappropriate, the comparison can only be taken so far, as the agenda to include children with disabilities is riddled with questions about the necessity to educate children with the most severe disabilities. In short, there were, and continue to be, questions about children who are "worth" educating (Kauffman & Hung, 2009; Kliewer & Biklen, 2001, 2007, but see Barclay (2011) for a contrasting view on society's obligation to offer social services to all people with disabilities). Social justice has long been associated with education, and many efforts to achieve social justice include direct efforts to ensure an educated populace. Specifically, several proposals to provide a comprehensive education have made reference to the need for literacy instruction (Beswick, Sloat, & Willms, 2008; Morgan & Moni, 2008). This is not surprising, as literacy is one of the key elements to a social justice informed education agenda. Why might this be the case? The answer is simple, but the implications are vast. Literacy is essential to uncloaking virtually every aspect of society. Specifically, the availability of the World Wide Web and information about the people and events in almost every part of the world not only allows people to be informed, it creates the need to be informed about those people and events. On an individual level, it is essential to gain access to information about goods and services necessary to navigate daily life. For example, government documents that allow one to seek employment in particular professions (e.g., credentials to operate machinery or work in a particular profession) or the location of freshwater are only some of the examples that require one to be literate in a number of different ways (Bartlett, Jayaram, & Bonhomme, 2011; Street, 2011). These examples may seem obvious on the surface and seem to lead to a rather simple conclusion—most, if not all, people need to be literate on some level in order to live. While the conclusion is quite logical, there is more to be said. Who among us should be literate? How might resources be allocated in order to reach those that should be literate, and does literacy mean the same for everyone, in spite of ability or capacity to learn? These are the questions that continue to plague a far-reaching social justice agenda that for some is obvious and for others too broad and ambitious to make sense of (Barclay). Preparation for adulthood is not the only purpose of education, and of course, there is more to schooling than simply learning to read, the most basic conceptualization of literacy. Educating children involves the learning of content, problem-solving, socialization, as well as a number of other purposes. But, the process of learning should not be overshadowed by the outcomes of learning, for it is the mechanisms necessary to facilitate the process, specifically reading or literacy, that are all important to reaching outcomes.

A Literate Citizenship

Who Among Us Is Literate?

It is estimated that, in the United States, one of out every three children who enters the first grade lacks the basic skill and motivation necessary for success in school (Morrow, Rueda, & Lapp, 2009). It is apparent that children have different experiences before entering school. What is not so apparent is how these differentiated experiences impact a child's ability and motivation to acquire basic reading skills. Many factors, including history of familial reading problems, exposure to books in the home, and socioeconomic status, potentially impact a child's readiness to read. This can be problematic, as some children do not reach proficiency and are unable to make adequate progress in school. Literacy—the ability to read and write—is one of the most important skills in modern culture. Educational and occupational success depends on reading proficiency. Clearly, reading and the larger issue of literacy is critical to education, particularly at a time when teacher accountability and high-stake assessment are lauded as the only viable gauge for student progress.

Yet, conversations about skill areas, like literacy, are generally not mentioned in the same breath as multicultural education or diversity. It seems that, for many, there is a clear separation between the two. Could it be that sensitizing people to particular issues or promoting inclusive education for all children, including children with disabilities, has nothing to do with building academic skill? Undoubtedly, this is not the case. Diversity is not a deficit, only a difference. Yet, many children from diverse backgrounds, including children with disabilities, are often assumed incompetent. Historically, efforts to educate professionals about diversity or multicultural education have largely focused on attitudinal changes, limited to acceptance. This is inefficient and may limit school reform efforts or targeted programs to notions about eliminating discrimination or reducing bias. Instead, a comprehensive social justice agenda calls for children, all children, to receive an education that instills knowledge, skills, and dispositions, preparing them to engage and transform their world.

Literacy as a Basic Human Right

Disproportionate literacy rates illustrate grave inequalities and have been demonstrated to be a barrier to healthy human development (Maddox, 2008; Meier, 2007). The call for literacy for all is not a new phenomenon. Article 26 of the 1948 Universal Declaration of Human Rights, adopted by the United Nations General Assembly, indicates that everyone has the right to an elementary-think basic education (Humphrey, Cassin, Chang, Malik, & Roosevelt, 1948). The implication of this proclamation is that individuals should have a foundational education, meaning enough to function effectively in society. This education should be focused on the full development of human capacity and hopefully lead to the strengthening of respect for human rights and fundamental freedoms. Similarly, Article 24 of the United Nations Convention on the Rights of Persons with Disabilities of 2007 specifies that individuals with disabilities have the right to an equal opportunity education and without discrimination. The creators of these articles saw that being able to read, write, and compute is the key to a respectable and meaningful life. Furthermore, improved literacy rates are crucial to the fight against violence, gender disparity, and poverty (Motakef, 2007). This is because educated individuals have more opportunities open to them as it pertains to career paths and other choices pertaining to life experiences. A knowledgeable society may not be possible without free access to information (Lor & Britz, 2007), but information is not accessible in any manner without an educated citizenry that has the basic ability to read. Without education, access to basic life opportunities may be virtually nonexistent.

Amartya Sen, the Nobel Prize winning Economist, speaks explicitly about the connection between literacy and human rights. The inabilities to read, write, count, communicate, or function in a meaningful way in society pose an incredible deficit in an individual's life. This deficit can manifest itself in the individual's inability to take care of basic human needs, including nourishment, daily hygienic necessities, and adequate living conditions. When someone's quality of life is impacted by illiteracy and innumeracy, insecurity and shame may result. In addition, this level of defenselessness could cause something terrible to happen, although, ironically, something terrible has already happened (Sen, 2003). Here, Sen is suggesting that the fact that an individual is illiterate is highly undesirable and a serious injustice as a basic human right has been withheld. The history of discrimination in the United States as well as other industrialized nations provides a number of examples of large portions of a society systematically denied an education based on race, ethnic, and language differences. What is not quite as evident, but just as relevant, is the history of people with disabilities and the systematic denial of services, including academic instruction that has paralleled the history of racial and ethnic groups. The outcome—discrimination and denial of basic rights—is largely the same. In contrast, the intent and manifestation of the discrimination are fundamentally different. The perspectives some hold about racial, ethnic, or more broadly multicultural issues may be shaped by local demographic factors (e.g., number of diverse students in the school), past experiences (e.g., positive or negative experiences with diverse populations), and/or prior training and education (e.g., specific course work in multicultural education). These contextualized viewpoints may actually hinder teachers from thinking about and convening a more global "picture" about a broader social justice agenda (Schoorman & Bogotch, 2010). In one sense, discrimination is discrimination, but in another, disability is seen somewhat differently than racial, ethnic, and language differences resulting in a different sort of discrimination. The fundamental difference relates to one of the core aspects of human nature—intelligence. In other words, people with disabilities are quite often assumed incompetent, and discrimination rests not just in differences in color of the skin or languages spoke but in assumptions about the incapacity of people with disabilities (Smart, 2001). People with disabilities, practically those with the most significant disabilities (i.e., severe intellectual disability; see reference, Schalock et al., 2007 for a discussion about the history of the label), are assumed to have inherent deficits that may not be amenable to remediation. Thus, some might contend that there are some people who simply do not need to be educated, and there is no reason to invest in their education, as they lack the intellectual capacity to be educated. This sets people with disabilities apart from others who have been denied access to education based on race or ethnicity and, as such, serves as a prime example of the need for an expanded social justice agenda. Next, we turn to a discussion on the connection between social justice and literacy.

Connecting Social Justice and Literacy

Social justice is a basic commitment to equality issues. For years, equal opportunity to participate in experiences that foster literacy acquisition has been a particular challenge for minority populations. Decades of unfair practices toward underrepresented groups have left behind a local legacy of poverty and academic achievement gaps (Golod, 2008). The educational quality of predominantly minority schools, especially in urban areas and poor rural neighborhoods, is not comparable to that of predominantly White schools. Students in schools with the highest concentrations of poor students (over 24 %) have especially low achievement (Verstegen & Ward, 1991). This typically leads to poor graduation rates for such groups. According to a 2009 report by the United States Alliance for Excellent Education, one-third of students leave high school without a diploma, and low graduation rates are largely found across minority populations. Within the 69 % of students who graduate, the distribution of graduates is as follows: Asians, 79 %; Whites, 76 %; Hispanics, 55 %; African Americans, 51 %; and Native Americans, 50 %.

The outcome of such disparity and inequalities in graduation rates, which has affected the economic stance of minority groups, is evident from the preschool years and continues throughout the intermediate grades. It has been established that emergent literacy skills are important for children's academic achievement and many preschool children from low socioeconomic and minority backgrounds have limited access to experiences that allow them to acquire these essential skills. As a result, many elementary school children in the United States are approximately 2 years behind their peers in literacy development (Clark & Kragler, 2005). Limited literacy experiences may be limited by print material in the home, oral reading experiences, adult oral interaction, and opportunities to engage with text in community settings. According to Potter (2007), children born in a context where there are inadequate literacy experiences do not see or feel print as significant in their lives, and as a result, it will not be meaningful in their everyday experiences. This detachment from text results in slow development of language skills and limited letter knowledge and phonological sensitivity at the preschool level, and insufficient decoding skills and less familiarity with words at the elementary level (Gettinger & Stoiber, 2007; Whitehurst & Lonigan, 1998).

Literacy for All

There is little doubt that students from diverse backgrounds, with disabilities, and speakers of English as a second language have experienced less success in schools in comparison to other students. The relationship between inadequate resources, disability status, race, cultural background, native language, and subpar academic achievement is well documented (Gregory, Skiba, & Noguera, 2010; Skiba et al., 2011; Skiba, Poloni-Staudinger, Simmons, Feggins-Azziz, & Chung, 2005). Yet, association or correlation does not imply causation, and it is difficult to delineate the casual factors responsible for such disparities. In spite of incomplete evidence supporting one hypothesis or another, if educators are to teach all children, the factors that contribute to underachievement must be identified and isolated and specific methods must be developed to eliminate or change these factors for the better. Traditionally, the deficit model has framed this discussion (see Valencia, 2010 for a comprehensive discussion of this model). The assumption that deficits are inherent to the child may account for some of the documented differential treatment that many children of color receive in schools (Byrnes & Wasik, 2009; Harry & Klinger, 2007). At issue here is how the past trends can be altered and past conditions associated with failure and underachievement can be changed. All of these issues are heavily intertwined with social justice. It is not just that particular children are not achieving or that educators should work toward quality education for all, there is more to consider. There should be little tolerance for the current conditions in both the developed and developing countries of mass student underachievement. An educated citizenry, to the greatest extent possible, should be a basic expectation for society. Why should large proportions of the population be denied access or opportunity to gain from a quality education? The answer seems to be obvious; this should not be the case. Achievement gaps, academic underachievement, and the like often fall victim to frivolous dichotomies that oversimplify the issue as the plight of an underclass of people that simply cannot or will not achieve.

According to Howe (1997), to ensure that students achieve their maximum potential, educational opportunities should be equal. That is, all students should have similar access to qualified personnel, resources, and experiences that will help them achieve their highest potential. Equality, he notes, does not mean the same thing as sameness. To say that every child should have the same experiences would be to expose students to “cookie-cutter” teaching practices. Teachers can ensure equality by adapting the curriculum to coincide with the differing experiences, abilities, and interests that students bring to the classroom, as this will allow them to pursue and refine their individual areas of strengths. Before a democratic and just educational system can be put in place, however, group differences in educational attainment that are linked to tangible resources such as employment and income must be considered. Because all groups do not have equal access to such resources that directly affect educational opportunities, it cannot be used as a determining factor for access. Howe indicates that in situations where tangible resources are unequal across groups, the public institution of education becomes responsible for intervening and “leveling the playing field” by providing the necessary resources for all students to have access to high-quality education. Clearly, the situation requires a more complex understanding of the issues with focus on a number of different problems requiring a host of solutions. There is no reason to believe that one single solution will lead to equal school experiences for all children, but this is not the point. Instead, there should be an open discussion about comprehensive schooling that promotes an informed social justice agenda that is directed toward academic and social development for all children. Here, we argue for a specific focus on literacy for all children, as a number of children are denied access to a number of opportunities in school, and face even less opportunity and support after leaving the educational system if literacy opportunities are below average or nonexistent. Literacy is a basic requirement for any semblance of survival in a modern world requiring everyone to access information in multiple formats. The call for teaching literacy naturally coincides with a call for how such an agenda might be implemented in schools. Such efforts require school leaders to consider literacy along with a number of other priorities all requiring attention and resource. Thus, leading schools with a distinct focus on promoting literacy for all students will be discussed next.

Leading for Literacy

In defining social justice as a verb, there are several elements (public policy, economic restructuring, and mass education efforts) that have been outlined as key factors in the consideration of this construct. We will now speak specifically to the necessity of education reform efforts. School leadership can be challenging, and there is a seemingly never-ending list of tasks school leaders must concern themselves with to meet the needs of students, parents, teachers, and other school staff. In a time when student academic achievement is paramount and accountability is the order of the day, school leaders are encouraged, even directed, to ensure that students meet standards (e.g., United States Department of Education's No Child Left Behind Act of 2008). While there is little or no recognition for making adequate academic progress, severe punishment may be levied for student academic failure. Thus, schools are now monitored more closely than ever, requiring school leaders to make every effort to help students achieve. Clearly, school leaders desire the best for students and there is no ill intent, but nevertheless, ensuring adequate achievement for all, including those with the most severe disabilities, is a challenge. Comprehensive schooling is by no means a new idea, and much has been asked of educators with regard to assisting students not only with basic academic skill but with character education and the like (see Counts, 1932 for some of the earliest ideas on this topic). The more that is asked of school leaders, the more school leaders must ask of themselves and others. The ever-increasing responsibilities of school leaders are analogous to a balancing act. Jean Piaget's conception of equilibrium can help illustrate this point (see Flavell, 1963 for an accessible introduction to a number of Piaget's concepts). Equilibrium is the search for balance between the "self" and the world and is only achieved through assimilation of new information and adaptation to the ever-changing environment. Piaget offered his theory of cognitive development to explain how children "see" the world and describe what they do with that information. Similarly, school leaders have a number of experiences (e.g., developing inclusive education programs and conducting teacher evaluations) and must take in new information (e.g., federal regulations and district initiatives). With each, school leaders must maintain a balance, not allowing one initiative or task to overtake another, causing an imbalance. Ensuring that the school remains in equilibrium is an ongoing task that requires not only a strong leader but also a comprehensive plan.

How is social justice related? Like any other call for change, social justice must be considered in the context of everything else. This is where the distinction between social justice as noun and verb is most critical. Social justice as a noun dictates that school leaders adopt a particular disposition and seek an understanding of social justice that can guide the vision or purpose for the school. Additionally, social justice as a verb must be well delineated, leading to a clear mission or direction for the school. In other words, it is not desirable or appropriate for social justice to be seen as an add-on in the context of any school. Fortunately, there is no need to see any change initiative, as yet another programmatic change requiring the shifting of resources with additional layers of programming that may be next to impossible to balance with all other existing initiatives, if implemented. Scaling up or implementing programmatic change across an entire school now has a history, and there a number of examples that provide some evidence that such efforts can be done and with some success. School-wide positive behavior support has been implemented in a number of schools across the country. This collection of systematic research-based behavioral interventions has served a number of schools well to make large-scale changes, improving student behavior for the better (e.g., Horner, Sugai, & Anderson, 2010). There have been efforts to investigate a possible connection between low academic achievement and misbehavior. The idea is that students who engage in frequent misbehavior may do so as a result of skill deficit or low motivation levels. In either case, there is reason to believe that each can be remediated using instructional and behavior support with both having strong empirical support (Simonsen, Fairbanks, Briesch, Myers, & Sugai, 2008). A general orientation toward positive empirically supported interventions has led some to think about the possible connection between general student need and comprehensive programming that might accommodate those needs without creating an unwieldy school program that pulls school leaders and school staff in a number of different directions. For example, both reading and behavioral screeners have been used as a means to help identify those students who might need additional support beyond the general programming available in classrooms (McIntosh, Horner, Chard, Boland, & Good, 2006). This allows programming to be targeted to those students with the most need, ensuring that resources are used most effectively. The connections between academic achievement and social behavior are receiving more attention, and there is evidence that a systematic approach based on a few empirical principles can provide the foundation for comprehensive programs that meet the needs of students, parents, teachers, and other school staff (Algozzine, Wang, & Violette, 2011).

School leaders are charged with creating a comprehensive school plan that meets the needs of students, parents, teachers, and other school staff. What is social justice leadership, and how might this kind of leadership be applied to efforts to create a school program that includes literacy for all? We address this question, with the intent to describe guidelines for creating and sustaining a social justice agenda that incorporates literacy. General discussions about social justice leadership can be found in other chapters of this volume. The "social justice challenge" pits a number of competing agendas against each other, inevitably requiring consideration of how to portion resource (Marshall & Oliva, 2009). In this case, resource should be understood more broadly than simply monetary funds; resource may also include time, person power (formerly manpower), professional development, and other factors. This, in part, creates the challenge for school leaders, as a socially just agenda almost certainly requires a consideration of how resources are currently allocated and how those resources might be reallocated. This challenge is a concern for both in-service and preservice school leaders, as understanding how one should create and sustaining a social justice agenda is not an easy task (McKenzie et al., 2008). There are several considerations for social justice leadership that includes literacy. Each of these considerations fits within the previously mentioned distinctions of social justice as noun and social justice as verb and is often inextricably linked. Each consideration will be discussed in turn.

The first consideration in this process is that social justice is in part a disposition or attitude about people, specifically children. Might this disposition be taught in a preservice course or conveyed in a professional development session, or might school leaders need to enter the profession with such beliefs? Preferably, both hold promise and might serve as viable avenues when promoting a socially just agenda or when recruiting professionals to preservice programs preparing future school leaders. Similar to other change efforts, social justice must begin with self-examination. As simple as self-examination may sound on the surface, the process is quite involved. There is virtually no one better equipped to deceive than the self (Smith, 2004; von Hippel & Trivers, 2011). It is quite easy to be convinced that one's personal views are in line with the mainstream and free of any bias that might be discriminatory toward a particular group. This is certainly the preferred position and one of the reasons why encouraging people to revealing their real feelings about traditionally marginalized groups can be a difficult task. School leaders must self-examine and adopt a specific disposition, one that includes an orientation toward educating all students, including those with the most severe disabilities. If the self-examination is limited to a consideration of traditionally marginalized groups and how those groups might be mainstreamed or included in existent programs, there is a real danger in further alienating these students, as many programs are designed based on deficit model thinking and often times require major overhauls (Brundrett & Anderson de Cuevas, 2008). Clearly, there is no incentive to openly admit racial or ethnic bias or any other socially undesirable position about any particular group. So, why is self-examination so critical to the process? The answer is actually quite simple. The process, if done with intention of learning about personal disposition, can be one of the most revealing exercises available to school leaders and other school staff. Just as it is quite easy for humans to deceive themselves, it is also possible for humans to use deep self-examination as a mechanism toward adopting genuinely different feelings. It is this process that can pave the way toward adopting social justice as a noun associated with the attitudes necessary to do the work associated with social justice as a verb. A process that begins with self-examination is the first toward building a culture of caring in which school leaders can include literacy for all students.

Second, school leaders must gain an understanding of how school staff thinks about different issues related to social justice. This is possible by creating unique assessment tools, surveys, or other tools. For example, Bustamante and colleagues (2009) created the Schoolwide Cultural Competence Observation Checklist (SCCOC) to determine how well schools respond to the needs of diverse students. No matter how information is gathered, the point is that school leaders will need to have some sense of how the school staff thinks about the school program. There certainly may be some aspects of the school plan that are invariant and cannot be changed, but this does not eliminate the need to understand the current climate and gauge how teachers may respond to a reframing of the plan. An assessment may also reveal some general sentiments that are already in line with future directions. Programmatic changes that are in line with the daily work responsibilities of teachers most likely have a better chance of success. Specifically, if teachers are asked to improve on instruction and receive support for improving instruction, there is a greater likelihood that this request is much better received than a request that requires teachers to come out of their comfort zones and perform duties that may not be in line with their daily routines.

The third consideration is professional development. Although school leaders must have a strong hold on policy development (Walker, 2006), there is also a need for helping teachers understand what needs to be done and how it is to be done. This is most often done through professional development. In this sense, professional development should not be understood as "one size fits all" or even as expert dissemination of information to teachers on a limited basis. Instead, there are clear examples of professional development that are better suited to meet the needs of teachers. For example, Kose (2009) describes a qualitative study in which three urban principals and their staff are followed for five months. In the study, Kose provides detailed examples of how each principal provides professional learning opportunities for their staff that included attention to social justice. In some cases, principals were solely responsible for providing the infrastructure for professional learning (e.g., release time for teachers), while in others, teachers had the opportunity to be more self-directed and choose materials (e.g., Internet-based experiences). This example exemplifies the need for a broad consideration of what it means to professionally develop teachers and how this may relate to a social justice agenda. In addition to professional development opportunities, any time that content is a focus and specifically when teachers are asked to make sustainable revisions to their pedagogy, specific professional development will need to be provided to support the transition from what was done previously to what should be done in the future. Literacy is a special case school leaders need to provide a number of examples of in order to help teachers understand how their pedagogy might change and how this can be done for students who have been traditionally considered unteachable. Fortunately, there are a number of examples that can serve as a starting point for reframing literacy for all children. Kliewer and Biklen (2007) provide an example of a young student with autism who was presumed incompetent by most teachers in his school, until a fundamentally different understanding of literacy was promoted, based on communication, which includes symbolic language (e.g., picture icons) that can be used to teach and promote literacy (see Kliewer & Biklen, 2001 for more similar examples). The point here is not to provide a comprehensive converge of the literature on literacy for children with severe disabilities but rather to highlight the fundamental shift that must be made to move toward a social justice informed agenda that includes literacy. In the final section, we discuss social justice as verb and delineate some of the actions we feel are necessary for school leaders to ensure literacy for all.

In sum, social justice requires a reconsideration of highly engrained thinking about education and particularly, school programming. There is little doubt that most school leaders appreciate the need for a balanced school program that meets the needs of students, including those traditionally marginalized based on race, ethnicity, or language. Often, these responses have been quite conventional and unimpressive upon closer examination, as much of the work has focused on attitudinal change and acceptance of difference. In many cases, difference was seen as a deficit, constraining the way educators and school leaders responded to calls for reform. In contrast, an informed social justice agenda calls for consideration of three critical factors: disposition, insight into current notions about student need, and professional development. These considerations are not outside of the current purview of current reform efforts. What is different here is the call for a comprehensive approach that incorporates a consideration of programming that requires a reconsideration of some core notions that may have impeded progress in the past. In short, an informed social justice agenda requires a willingness to question virtually every notion about educating children—all children. To this point, the discussion has focused on social justice as noun. The balance of the discussion will offer some specific recommendations that incorporate the previous discussion and describe a possible vision for social justice as a verb or more succinctly, social justice action.

Toward an Informed Evidence-Based Practice

Just agreeing that social justice is important is not enough; social justice must be practiced. Within the context of education, social justice must challenge the dynamics of oppression and privilege and must recognize those societal views that may be detrimental to student progress, and more specifically, current school practices are rooted in social stratification along the lines of race, class, gender, sexual orientation, and ability. Such historical practice of injustice toward specific groups has contributed to policies and practices that negatively impact the daily lives of some groups more than others. This has led to disparities in literacy rates, standardized test scores, and graduation and dropout rates between the minority and majority cultural groups. It has also helped to shape our conceptions of self and others in conscious and unconscious ways. Thus, social justice within the education system must be confronted and addressed in deliberate ways (North, 2009; Sensoy & DiAngelo, 2009). Here are specific ways that educator preparations programs, educators, and administrators can improve social justice awareness, acceptance, and integration in the education system:

1. *In teacher-preparation programs, teach teacher candidates about diversity and social justice*. Teaching for social justice begins long before a teacher enters the classroom. A teacher becomes competent in promoting social justice in the classroom when he or she has been taught about the importance of social justice in a teacher-preparation program. Two ways in which a teacher-preparation program can encourage social justice in the classroom are through service-learning opportunities and explicitly teaching about the impact of words in strengthening or demoralizing cultural groups. Teacher educators can build into their curriculum service-learning projects that will require teacher candidates to simultaneously learn content while engaging in service-learning experiences that reinforce their new knowledge. Students can engage in the following experiences: (1) working with children who are disabled, who live in poverty, and who are from underrepresented groups; (2) tutoring adults who are working to receive their General Educational Development (GED)/high school diplomas; and (3) traveling abroad to teach English or participate in building construction.

These opportunities help teacher candidates to reflect on the new insight they have gained as a result of working with these groups, confront their beliefs about diverse populations, reevaluate their feelings about such groups, and celebrate the differences that these individuals contribute to the larger society (Baldwin, Buchanan, & Rudisill, 2007; Johnson, 2007).

As an elementary school teacher (second author), encountered two teachers from the majority culture who had low expectations for the African American students with whom they worked, and they used their words to voice their internal feelings. They expressed thoughts such as, "*I can't work with these kinds of students,*" *These kids can't learn,* and "*I just don't get these kids and their culture.*" Thus, explicit instruction in how words are powerful agents in empowering or destroying specific cultural groups should also be explicitly taught in teacher-preparation courses to help candidates become introspective and identify possible biases. This knowledge is particularly relevant to those teacher candidates who will be teaching in English language arts classrooms. This is because this group will teach students about the impact of spoken and written words. Activities that are germane to the English language arts classroom that teachers can use to emphasize the importance and impact of words include small group and class-wide discussions, journal and free writing, reading literature, and interpreting film (Staples, 2008). Once teachers have actively engaged students in this kind of work, careful action must be taken by teachers and students to counter the effect of hurtful words. These actions can include substituting new words for demeaning ones, placing oneself in scenarios to develop empathy for disenfranchised groups, and actively drawing attention to the historical, social, and political stimuli of devaluing words (Staples, 2010).

2. *At the school level, ensure that educational leaders address the need for social justice.* According to Rothstein (2004), social class is a strong predictor of academic achievement in students' standardized performance, and school reform is not enough to narrow the achievement gap between White, middle-class students and their minority, lower-class peers. Additionally, Lalas and Morgan (2006) indicate that the inequity exists along the lines of assessment, standards, and curriculum. Thus, educational leadership for social justice involves the emphasis of equity, care, respect, and concern for all groups. As administrators govern the school body, they must instill the need for culturally responsive teachers, the importance of multiple assessments to inform instruction, and the significance of providing equal opportunities for all cultural groups (Picower, 2007; Stone, 2000).

   To foster culturally responsive teaching, administrators can provide professional development opportunities for teachers by giving them culturally relevant reading material, allowing them to participate in professional development workshops, encouraging them to share in professional book club sessions, and offering mentors. Because of the differing backgrounds and experiences of students, they come to school with different ways of learning and demonstrating their knowledge. Thus, administrators must set before their teachers the expectation that students must be assessed using multiple measures to ensure that their strengths are not overlooked. The use of multiple measures will also ensure that minority populations are being given the opportunity to participate in advanced placement and gifted programs, are not being tracked into lower-performing classrooms, and are not being overrepresented in special education programs (Anderson & Harry, 1994; Booker & Mitchell, 2011; Ming & Dukes, 2006; Townsend, 2002).

3. *In the classroom, confront life experiences through poetry writing and multicultural literature*. Educators can help students to confront their life experiences through poetry writing. In doing so, this will help them to be aware of the role that culture plays in literacy development and enable them to make deliberate decisions about striving for literacy. Poetry writing is a medium for telling the truth, which makes it a powerful tool for helping students to face their cultural experiences and situations and reflect on it. With poetry writing, students must ask themselves key questions as they grapple with the complexity of culture and what it means for their literacy development. Some of these questions include the following: What is my purpose for writing this poem? Am I sharing my truth as I have experienced it? Will I help a reader confront his or her own truth? When students reflect on their experiences, it allows them to take charge of their future, which includes striving for academic success, of which literacy development is a part (Jocson, 2009). As it pertains to specific literacy development, poetry writing leads to literacy development in the area of composition as students refine their use of the writing process (prewriting, drafting, revising, editing, and publishing) and integrate it with the six traits of writing (ideas, organization, voice, word choice, sentence fluency, and conventions) to make their ideas clear.

   Like poetry writing, the use of multicultural literature in the classroom can help both educators and students to address life experiences and reflect upon them. For educators, multicultural literature serves to enhance their personal and professional development. Because educators will work with students from diverse cultural backgrounds, it is incumbent upon them to have a deep understanding of the history of these groups, how they function, and what their attitudes are toward literacy in order to have the highest expectations for them and provide them with effective instruction. Reading professionally and personally will also help to dispel misconceptions that could bias them in working with these diverse groups. For students, multicultural literature opens up a world of experiences and introduces them to cultures with which they may not have had opportunities to interact. In helping to promote social justice, teachers can incorporate multicultural literature in the teaching of their lessons. This will help diverse populations to identify with and take pride in the accomplishments of their culture and will expose the majority population to other cultures, as well as help students to see the interconnectedness across cultural groups. To foster specific literacy development, the reading of multicultural literacy increases students' vocabularies and general knowledge about the world, and it helps to improve their decoding skills (Ming & Dukes, 2006; Szecsi, Spillman, Vásquez-Montilla, & Mayberry, 2010).

4. *In the classroom*, *use discussion forums to address social concerns*. Curriculum guides bind curriculum in many classrooms, high-stake testing, and standards-based outcomes. Because of this, the inclusion of social justice topics is often

relegated to the "back burner," as they are not deemed critical to students' yearly performance and progress. Focusing on the academic curriculum to the exclusion of the social curriculum can prove to be harmful to those groups who have been marginalized because when there is incongruence between the majority and minority groups, the teaching of the curriculum is less effective in stimulating the latter group's learning (Brooks & Thompson, 2005). Thus, educators can helps students understand the importance of respecting each other's beliefs, lifestyles, and practices by promoting the discourse of social issues in the classroom setting. These forums can occur within designated periods of time on specified days of the week. In this setting, the teacher acts as a facilitator and allows students to lead the discussion. The teacher provides appropriate prompting to the discussion leaders by reminding them not to ignore, transpose, or marginalize participants' points of view (Brooks & Thompson). Topics can include issues such as sexual orientation, gender access to school activities and organizations, religious practices within the school setting, and acceptance of various cultural groups. Students are encouraged to demonstrate fidelity to the agreements that are made about the various topics. With regard to specific literacy development, discussion forums help to strengthen students' oral communication skills. They learn how to voice their opinions in meaningful ways, learn how to be receptive to others' point of view, learn how to identify and name a problem publicly, and learn how to make persuasive arguments when proposing solutions to problems (North, 2009).

Conclusion

There is little value in equating social justice with the simple proclamation, justice for all. Rather, social justice for all students, including those with the most severe disabilities, is much more than the absence of injustice. An informed social justice agenda is informed by an understanding of social justice as a noun referring to a particular disposition that requires school leaders and school staff to think about comprehensive schooling that includes school-wide efforts to educate and nurture children. Additionally, an informed agenda requires the consideration of social justice as verb, or the direct actions that must inevitably emanate from dispositions directed toward social justice for all children. Literacy serves as an excellent example to illustrate the importance of an expanded agenda that speaks to comprehensive schooling for all children. Reducing bias or attitudinal shifts are simply not enough in the wake of a global world that requires an educated citizenry that must be literate.

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Part II

Approaches to Knowing/Studying Social Justice

Chapter 9
Researching Leadership for Social Justice: Are Some Methods Better than Others?

Robert Donmoyer

This chapter focuses on the relationship between research methods, on the one hand, and leadership for social justice, on the other. The chapter contains two sections. In the first section of the chapter, I will view the relationship between social justice concerns in education and research methodology from an historical perspective. Among other things, this section of the chapter will explain why certain researchers reject the use of quantitative methods for studying social justice-related issues. In the second section, I will challenge some of the thinking outlined in the first section and argue that there is nothing *inherently* problematic with using quantitative methods to explore the empirical aspects of a social justice agenda in education, in general, or leadership for social justice, in particular.

Historical Perspectives on Empirical Research and the Social Justice Agenda in Education

Using Education to Promote a Social Justice Agenda During the First Half of the Twentieth Century

Anthropologists remind us that formal education normally serves as a vehicle that societies use to transmit the existing culture to new generations and socialize the culture's young into already well-established cultural norms, social structures, and ways of operating (Spindler, 2000). This cultural transmission game plan is not

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always followed, however. During the twentieth century, for example, leaders of new countries that were, in essence, colonial creations often employed education for nation-building purposes (Konyeaso, 1975). Their goal was not to *transmit* an already established culture; rather, they attempted to use formal education to supplant local or tribal cultures that had been in existence for generations with a relatively recent (and, in most cases, an artificially generated) national culture.

Cultural transformation also has been embraced by some as a goal for education in already developed nations. Within the United States—the country that will serve as a focal point for most of this chapter[1]—for instance, an interest in using education to transform society and promote social justice can be traced back to the progressive education movement that flourished during the first part of the twentieth century.

To be sure, during the early twentieth century, there were many different types of progressive educators, and the different types varied with respect to their commitment to using education to promote social justice. For example, as their name implies, the so-called social reconstructionists were not at all shy about trying to use the school curriculum to radically transform what they believed was an inequitable and, consequently, an unjust society. This lack of reticence in promoting what today would be characterized as a leftist agenda should be obvious to anyone who reviews the contents of the widely used history textbook series written by social reconstructionist progressive Harold Rugg (Carbone, 1977). It also would be obvious to anyone who reads *Dare the Schools Create a New Social Order?,* the influential book written by another social reconstructionist progressive, economist George Counts (1978, c1932). Indeed, any reader of Counts' book quickly understands that, for Counts, the question that served as his book's title was rhetorical rather than real. For Counts, in other words, there never was a question; the schools most certainly should attempt to transform society and make it more equitable and just.

Certain other progressives shared the social reconstructionists' social justice goals but not, necessarily, their tactics. John Dewey (1916, c1997, 1938), for example, was concerned that education did not become indoctrination, and, consequently, he emphasized developing students' thinking and inquiry abilities through engaging them in problem solving and communication within the context of democratically organized classrooms. These sorts of activity, Dewey argued, would develop in students the kinds of knowledge, skills, and dispositions that eventually would lead citizens in a democratic society to choose to create and live in a more just and equitable society.

A third type of progressive educator that was influential during the first half of the twentieth century was the group that historian David Tyack (1979) labeled the *administrative progressives.* This group, led intellectually, at least, by Stanford

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[1] United States culture is the focal point here because it is my culture and, consequently, the culture I know best. Although I have lived elsewhere for periods of time and studied what is happening in other countries and cultures, I simply do not have adequate expertise to write a handbook chapter about other places. So, this chapter's focus on the United States has everything to do with my inadequacies and nothing to do with any claims that the United States should serve as a model for the rest of the world.

University professor, Elwood P. Cubberly (1909), often referred to as the father of the Educational Administration field within the universities and colleges, at times borrowed some of the rhetoric of other progressives, most notably John Dewey. But in translating Dewey's ideas into the organizational dimensions of schooling, they also introduced a new element into the progressive movement as well as a new goal that often undermined earlier social justice concerns. The new element was bureaucracy; the new goal was the promotion of efficiency (Callahan, 1964). By the middle of the twentieth century, this efficiency goal and the bureaucracies that administrative progressives established to promote it frequently trumped other progressives' commitment to using the schools to promote social justice.

Social Justice Concerns and the Debate About Educational Research During the Second Half of the Twentieth Century

The interest in using education to promote social justice did not completely disappear during the second half of the twentieth century in the United States. An interest in promoting social justice both within and outside of schools, for example, was kept alive by the civil rights movement that began in earnest in the 1950s and the feminist movement that can be traced back at least to the 1960s. Indirect support for continuing to focus on social justice concerns during the second half of the twentieth century also came from another somewhat surprising source: the debate about research methods that was being carried out in earnest within the educational research field during the final three decades of the century.

The Conception of Educational Research Prior to the 1970s

Prior to the final three decades of the twentieth century, the educational research community spent little time debating what research methods its members should use to study educational phenomena, including the phenomena of educational leadership and management. There was general agreement, for example, that educational research entailed quantification of one sort or another.

Within the educational administration field, for example, the quantitative research that was conducted during the first three quarters of the twentieth century tended to involve questionnaires and survey designs. Researchers in the educational administration field could do this, according to Bridges (1982), because researchers within the field had little interest in directly examining organizational outcomes or systematically exploring which organizational and leadership variables had produced particular outcomes. In the field of educational psychology, however, outcomes—and the linking of outcomes with process variables—were major concerns. Consequently, there was an emphasis on doing experimental—or at least quasi-experimental—studies that compared those members of a group who had experienced a particular educational intervention (the so-called experimental group) with those who did not (i.e., the control group) (Campbell & Stanley, 1971, c1963). The goal, in short, was to develop the sort of knowledge that would enable educators to predict and, ultimately, control what would happen in (and also out of) schools. In 1910, for example, E. L. Thorndike wrote, in the inaugural issue of the *Journal of Educational Psychology*, that a

> complete science of psychology would tell every fact about everyone's intellect and character and behavior, would tell the cause of every change in human nature, would tell the result which every educational force—every act of every person that changed any other or the agent himself [or herself]—would have. It would aid us to use human beings for the world's welfare with the same surety of result that we now have when we use falling bodies or chemical elements. In proportion as we get such a science we shall become masters [and mistresses] of our own souls as we are now masters of heat and light. *Progress toward such a science is being made.* (p. 6, emphasis added)

While researchers in the subfield of educational administration field did not, themselves, normally employ the sort of experimental and quasi-experimental research designs that educational psychologists like Thorndike advocated using, they certainly were aware of and alluded to the experimental work that was going on in other parts of the educational research field (Cubberly, 1909). Indeed, the idea that educational researchers could and would uncover "the cause of every change in human nature…[and] ever act that changed any other or the agent himself [or herself]" (Thorndike, 1910, p. 6) helped legitimate the educational administration field's emerging faith in bureaucracy: If educational researchers would soon tell us, with certainty, what to do to produce desired results, there was a need for school leaders to create the sorts of educational organizations that could insure—through well-established standard operating procedures and appropriate rewards and sanctions, for example—that the right things got done in schools.

There is an implicit point in the previous paragraph that needs to be made explicit: The influence of Thorndike and his disciples on the educational administration field—and on education, generally—had much more to do with rhetoric than results (Donmoyer, 2005). Indeed, throughout the first three quarters of the twentieth century in the United States, Thorndike's rhetoric had a major impact on educational practice, in part, because it helped justify the bureaucratization of schooling. The empirical research that Thorndike and his followers conducted, however, provided little in the way of definitive or useful results. One highly touted finding that took nearly a half a century to produce, for example, was about time on task: Students who spent more time engaged in a certain kind of task, researchers informed us, were more likely to learn how to do the task than students who spent less time practicing the task. Clearly, this finding was, in effect, little more than a statement of the obvious. The same could be said of other "findings" produced by research associated with the Thorndike conception of educational research.

Members of the Research Community Recognize a Problem

The results that had been produced after many decades of research that attempted to implement Thorndike's vision of what researchers should do, in fact, were so limited that, by the 1970s, a number of scholars were rethinking the form and function of educational research. One of these scholars was the eminent twentieth-century educational psychologist and statistical analysis guru, Lee Cronbach. In the mid-1950s, Cronbach (1957) had stood in front of an audience at the annual meeting of the American Psychological Association and declared that educational psychologists could finally achieve what Thorndike had promised decades before if they stopped focusing on the impact of treatments on individuals, in general, and instead, focused on how treatments impacted individuals with particular characteristics (or, to use Cronbach's terminology, different *aptitudes)*. By the mid 1970s, however, after spending twenty-plus years searching for what Cronbach called "aptitude x treatment interaction" effects and producing "inconsistent findings coming from roughly similar inquiries" (Cronbach, 1975, p. 119), Cronbach once again stood before attendees at an American Psychological Association annual meeting and, this time, declared:

> Once we attend to interactions, we encounter a hall of mirrors that extends to infinity. No matter how far we carry our analysis—to third order or fifth order or any other—untested interactions of a still higher order can be envisioned. (Cronbach, 1975, p. 119)

In his speech in the mid-1970s, Cronbach (1975) actually endorsed supplementing the quantitative procedures traditionally used in interaction effect studies with the sorts of qualitative research procedures employed by ethnographers in the discipline of anthropology. Like anthropologists such as Geertz (1973), Cronbach spoke of the need for *thick description*. According to Cronbach, thick description could be used to explore, ex post facto, what had happened in a study when things did not turn out as expected (and as they did in another similar study).

Cronbach was not the only educational researcher at that time to look to the qualitative methods used by ethnographers for new methodological options. A number of evaluators of educational programs both inside the United States (see, e.g., Stake, 1975) and in other countries (see, e.g., Parlett & Hamilton, 1977) also had become frustrated by the fact that the educational research community's traditional experimental methods failed to detect program outcomes that they believed had been produced; they also were frustrated by the fact that traditional experimental designs did not provide an opportunity to explore obvious—and obviously important—unanticipated outcomes. They, too, looked to ethnography for methodological options to use in the evaluation studies they conducted.

Very quickly, other members of the educational research community, not just educational evaluators, began using ethnographic and other types of qualitative methods. In time, major educational research journals began publishing qualitative studies, and studies that employed qualitative rather than quantitative methods became commonplace on research conference programs.

New Methods and Their Meaning

Many of the educational researchers and evaluators who began to use qualitative methods during the final quarter of the twentieth century were only interested in finding methodological alternatives to either supplement or supplant the field's quantitative methods that they believed were inadequate for studying educational phenomena (Miles & Hubberman, 1999, c 1984). Others, however, began to view the educational research field's growing interest in qualitative methods as something akin to the paradigm revolutions that Kuhn (1996, c. 1970, 1962) had indicated occurred periodically in the physical sciences. More often than not, social justice concerns were at least implicit in the thinking of this latter group.

Arguably, the leaders of the new-paradigm group were Lincoln and Guba. In their influential book, *Naturalistic Inquiry*, for example, Lincoln and Guba (1985) associated the use of qualitative methods with visions of knowledge, reality, and ethics that were totally different than—and, according to Lincoln and Guba, incommensurable with—the thinking of traditional quantitative researchers. Indeed, consistent with what they believed was Kuhn's description of paradigm revolutions in the physical sciences, Lincoln and Guba wrote that what they were articulating was "an entirely new paradigm, not reconcilable with the old…" just as "the world is round cannot be added to the idea that the world is flat" (p. 33).

Thus, Lincoln and Guba (1985) argued that traditional researchers (a group they labeled *positivists*) and adherents to their new paradigm (who they referred to, in their 1985 book, as *naturalists* and later called *constructivists*) embrace distinctly different (and, according to Lincoln and Guba, logically incompatible) ideas about the nature of reality. While positivists embrace an ontology that assumes that "reality is single, tangible, and fragmentable," Lincoln and Guba wrote, constructivists assume that "realities are multiple, constructed and holistic." (Lincoln & Guba, p. 37).

These different views of reality also have significant epistemological and methodological implications, according to Lincoln and Guba (1985). When one views the world through Lincoln and Guba's naturalistic/constructivist paradigm, for example, knowledge is no longer discovered. This claim had major ethical implications, since researchers bear far more responsibility for the impact of their findings if they have at least partially constructed them rather than simply discovered a picture of reality that they had no influence on creating.

In addition, while E. L. Thorndike and others who are under the spell of the positivist paradigm assume that "every action can be explained as the result (effect) of a real cause that precedes the effect temporally (or at least is simultaneous with it)," Lincoln and Guba (1985) argued that adherents to the new naturalistic/constructivist paradigm embrace a conception of reality or ontology that envisions a world that is not a world of predictable cause and effect relationships; rather, human beings construct (and constantly reconstruct) the social world through ongoing social interaction. "All entities are in a state of mutual simultaneous shaping," Lincoln and Guba wrote, "so that it is impossible to distinguish causes and effects" (p. 38).

Consequently, for Lincoln and Guba's (1985) constructivists, the only legitimate type of research is case study research that can provide thick descriptions (Geertz, 1973) of social life. Thick description, among other things, focuses on the way those being studied make sense of the world and the meaning they, themselves, construct; it also portrays social phenomena as being interrelated and describes them in context rather than by translating social phenomena into discrete and decontextualized variables.

Much of what Lincoln and Guba and their intellectual allies wrote about was not new. As has already been noted, scholars like Lincoln and Guba (1985) borrowed (and, in some cases, adapted) the concept of thick description, as well as most of the methods they advocated using, from anthropology. Furthermore, the argument that researchers should focus their attention on socially constructed meaning can be traced back to the writings of Wilhelm Dilthey (2002) during the advent of the social sciences in the nineteenth-century Europe, and in the twentieth century, to the symbolic interactionist (Blumer, 1969) and ethnomethodology (Garfinkel, 1967) subgroups within sociology.

What was unique in Lincoln and Guba's writings, however, was their claim that social constructivist thinking represented a distinct paradigm that was incommensurable with other ways of thinking about and doing research (Donmoyer, 2011). There was also an ethical emphasis in Lincoln and Guba's work that distinguished their thinking from what came before and that also resonated with social justice concerns. As one of Guba's students, Patti Lather (1986), later argued, from the perspective of the new research paradigm, all empirical research requires the sort of a priori framing that insures that it is ideological and serves the interests of some groups while it disadvantages others.

Thus, according to Lather (1986), the relevant distinctions are (a) whether research is openly or clandestinely ideological and (b) whether a researcher chooses language and frames her or his research questions and research design in conventional, commonsensical ways that almost invariably serve the interests of those who already are part of a society's advantaged group or whether the researcher frames her or his research in a way that challenges the privileged and serves the interests of those who are currently disadvantaged.

Lather (1986) was clear that she was engaged in openly ideological research that was explicitly designed to serve the interests of the less privileged members of society. She even developed a research strategy inspired, in part, by feminist consciousness raising sessions that she dubbed *research as praxis.* The research-as-praxis strategy entails having a researcher work collaborative with some of the least privileged members of society to help them—and, also, the researcher—understand what is happening and how inequities might be overcome.[2]

Guba, Lincoln, and their former students such as Lather were not the only voices articulating and advocating for a social constructivist paradigm within the research field during the final quarter of the twentieth century. Within the educational administration field, for example, Canadian Thomas Greenfield (1975, 1978, 1980; see, also, Greenfield & Ribbins, 1993) was articulating ideas that were strikingly similar to the ideas being articulated by Lincoln and Guba. The major difference is that Greenfield's ideas were directed at the field of educational administration and specifically focused on rethinking the nature of educational organizations. Culbertson, for example, noted in 1988 that Greenfield "argued that educational organizations are not 'objective" phenomena regulated by general laws. Rather they are mental constructs that reflect the perceptions and interpretations of the members" (p. 3.).

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[2] Later in her career, Lather discovered postmodernism and this turn resulted in the development of research strategies that not only had researchers working collaboratively with their research participants but also had researchers intentionally undermining their authority. For examples of this genre of work, see Lather, 1991 and Lather & Smithies, 1997.

Some significant variations on the Greenfield/Lincoln and Guba type of paradigm talk also surfaced during the final quarter of the twentieth century. Critical theorists both inside (see, e.g., Foster (1986) and Bates (1980, 1982, 1987, 1989)) and outside (see, e.g., for example, Lather 1986; Sharp & Green, 1975) of the educational administration field, for example, emphasized how macro-forces within the larger society reproduced social inequality. These scholars often criticized scholars such as Lincoln and Guba and Greenfield for failing to attend to how these macro-forces influenced and, in fact, constrained the social construction of reality through face-to-face interaction.

In 1986, for instance, Anderson advocated using an approach to research he labeled *critical ethnography*. Critical ethnography looked not only at social interaction within schools and other organizations but also at how macro-forces set the stage for and often choreographed the sorts of social constructivist process that both Lincoln and Guba and Greenfield described. (For a recent update of Anderson's position, see Anderson & Scott, 2011.)

Summary

In this part of the chapter, I have demonstrated that there was an extensive debate about research methods and their meaning within the educational research community during the final quarter of the twentieth century. What may be less clear at this point, however, is what the new thinking about research that was articulated during the final quarter of the twentieth century has to do with leadership for social justice. That is the focus for the final part of this first section of the chapter designed to provide an historical perspective on the relationship between research methodology and leadership for social justice.

The Significance of the Methodological Debate for Leadership for Social Justice

Qualitative Studies Expose Within-School Mechanisms for Promoting Social Inequality

The most obvious relationship between the debate about research methodology that was conducted during the final quarter of the twentieth century, on the one hand, and leadership for social justice, on the other, is that the debate about research methods ended up legitimating qualitative studies that allowed researchers to look closely at what happens in schools and see close-up how those who work in schools can help produce—and reproduce—social inequality. This research, in short, provided a manual of sorts about what school leaders interested in promoting social justice should attend to in the schools and school districts they head.

One of the earliest of these studies was Ray Rist's (1973) *The Urban School: A Factory for Failure.* In this book, Rist documented how a kindergarten teacher sorted her students into a winner and a loser group within the first few days of the school year and how the groups remained virtually the same as he followed the students throughout the kindergarten year and during the next two years of schooling.

This consistency over three grades of schooling with three different teachers should not be surprising, according to Rist (1973), because he documents how the winners and losers received both different types and different amounts of instruction. Indeed, Rist's data suggest that the kindergarten teacher provided very little instruction to the loser group, so there is no reason to believe that any member of this group should have been able to transcend the initial classification during the kindergarten year or that they would not be behind the members of the winner group when they entered the next grade. Adding to the tragedy Rist describes is the fact that the initial classification of students seemed to be based primarily on nonacademic indicators such as the quality of the clothing children wore.

There have been countless other studies over the years that have presented a similar scenario to the one found in Rist's (1973) *The Urban School: A Factory for Failure*. At times, the scenario has been a bit more complex. In Willis' (1977) classic *Learning to Labor*, for example, the British working-class secondary students he focused on and studied actually contributed to their own marginalization in the academic world as a way of asserting and preserving their cultural identity.

Ogbu's (1978; see, also, *Anthropology and Education Quarterly*, 1996) ethnographic studies of African-American students in the United States present a strikingly similar story line. A more recent example of roughly the same scenario—albeit with another setting (British Columbia, Canada) and a different cast of nonmainstream-culture characters (South Asian teenagers)—can be seen in the study that recently won the American Educational Research Association Division A Outstanding Dissertation Award, Sayani's (2010) *Pathologies and complicities: How School and the Identities of Disaffected South Asian "Brown Boys."*

These studies—and many others like them that used qualitative methods to get a closeup look at schooling—have rather obvious implications for school leaders. For example, the stunning and rather horrific events that Rist (1973) and others recounted should sensitize school leaders to the sorts of things to listen for when interviewing and hiring prospective staff as well as to what to look for when they supervise those staff members they do hire. The Rist study as well as the Sayani study also suggest the need for attitude adjustment-oriented professional development initiatives for teachers, since, clearly, if teachers believe that certain types of students are incapable of learning very much, they will structure their classrooms in such a way that members of these group have little opportunity to learn very much.

To be sure, the implications for social justice-oriented school leaders of studies that portray students as being, in essence, complicit in the less than equitable outcomes schools produce are a bit less obvious. But these studies, at the very least, suggest the areas in which school leaders could focus their attention. The Willis

(1977) study, for example, suggests that school leaders should work hard to break down the mental work/physical labor binary that, in the current era, is not all that appropriate anyway. The growing number of programs that attempt to blend academic education with vocational programs may provide at least a blueprint for social justice-oriented leaders to use in redesigning the school environment and making it less alienating for certain kinds of students. Certainly, Shirley Brice Heath's (1999, c1983) qualitative study reported in the now classic book *Ways With Words* demonstrates that school employees, if they wish to do so, can adjust to culturally different students rather than requiring that culturally different students adjust to the mainstream culture reflected in the organizational culture (Schein, 2004) of most schools.

To summarize, qualitative studies of the production of social inequality provide a catalogue of quite specific and exceedingly concrete actions that promote social *injustice*. This catalogue can be used by school leaders as warning signs that prompt intervention. Even if the critical theorists (see, e.g., Anderson & Scott, 2011; Bates, 1980, 1982, 1987, 1989; Foster, 1986) are correct when they indicate that those who promote social inequality within schools are simply playing roles and enacting scripts created by macro-forces within the larger society, school leaders can still lead a resistance movement in the environments for which they are responsible. Studies like the ones referenced here suggest where school leaders should target their resistance.

The Impact of the New Ways of Thinking About Research and Social Life

The findings of qualitative studies like the studies by Rist (1973), Willis (1977), Sayani (2010), and Heath (1999, c1983) that were discussed, albeit briefly, in the prior section can be exceedingly useful to school leaders committed to promoting social justice in the schools they head. The new ways of thinking about social reality that surfaced during the methodological debates during the final quarter of the twentieth century, however, may be even more influential and important than specific research findings. To state this point another way: Just as Thorndike's rhetoric was more influential than the results of studies inspired by his rhetoric (Donmoyer, 2005), the same might be said about the rhetoric of the twentieth-century advocates of qualitative research (even though, in this case, the results of studies are hardly meager, as the above discussion of a handful of representative studies demonstrates).

Here I want to discuss two implications for school leaders of the new ways of thinking about research and social life that social constructivists such as Lincoln and Guba and Greenfield, on the one hand, and critical-theory-oriented scholars such Bates (1980, 1982, 1987, 1989), Sharp and Green (1975), and Anderson (1986) articulated during the debates about research methods that occurred in the educational research field during the final quarter of the twentieth century. The first implication relates to thinking that portrays social life as a social construction.

Among other things, constructivist thinking should free school leaders interested in promoting social justice in their schools to create the sorts of school cultures that treat all students fairly and equitably. Once we see the world as being socially constructed, we no longer live in the sort of deterministic world described by Thorndike and his disciples, and the primary task of school leaders, therefore, is no longer to create a “one best system” of schooling that corresponds to the “natural” order of things (Tyack, 1979). Rather, school leaders, along with other educators in the schools that leaders head, can construct—and, if need be, reconstruct—the always idiosyncratic school cultures in which they work with an eye toward promoting rather than inhibiting the fair and equitable treatment of all of their schools’ students. After all, even critical theorists—who suggest that a form of social determinism is always operating in society and, consequently, in society’s schools—talk about the phenomenon of resistance (Kincheloe & McClaren, 2002). In short, the new ways of thinking about both research and social life that emerged during the final quarter of the twentieth century remind school leaders that they have the ability to challenge societal forces that reproduce social inequality and, along with their staffs, construct learning environments that are oriented toward obliterating rather than reproducing social inequality.

The second implication I want to discuss involves the fact that constructivists’ claim that knowledge is constructed at least as much as it is discovered demystifies even *quantitative* research studies, including quantitative research studies that, in the past, have been vehicles for legitimating social inequality. In the past, for example, many researchers studied a group of failing students they characterized as *culturally deprived* rather than simply as *culturally different.* The *culturally deprived* language, in effect, identified the source of the problem before any data were collected and, in many cases, before a study was even designed. The culturally deprived label, for example, assumes that the students and their families are the source of difficulty. Consequently, researchers who studied “culturally deprived students” never even entertained the idea that—much less collected data about whether—inadequacies in the schools these students attended contributed to their inability to do well in school. They certainly were not inclined to ask how, specifically, schools should modify their ways of operating to accommodate culturally different students as was done in the Heath (1999, c1983) study alluded to above.

Now, the constructivist conception of social life that was articulated in the debates about research that occurred during the final quarter of the twentieth century reminds us that no empirical study is entirely empirical. Rather, the way an “empirical” study is framed determines what counts—and what gets counted—and, consequently, has a major impact on a study’s “empirical” results. In short, the constructivist’s view of social life encourages a healthy skepticism about “empirical” studies, including quantitative studies about “culturally disadvantaged students.”

Before moving on, let me provide one other contemporary example to illustrate the second implication I am discussing here. The example involves what I, personally, think about when I review the results of the psychometrically sophisticated standardized tests developed and administered by state governments.

I currently live in California, a state with a large Mexican-American population. For many Mexican-American students, English is a second language; consequently, many Mexican-American students do not do as well in school—or on state tests—as many of their Anglo counterparts do.

To function in a school—and in the society beyond the school walls—however, most Mexican-American students eventually learn English and eventually become, in effect, bilingual. Their English skills, might not quite measure up to the English skills of native speakers, but they, still, would be coded by most people as being bilingual. Because I have been sensitized to the fact that even "scientific" knowledge is more a construction than a discovery, I periodically remind myself that the state-mandated standardized tests California students must take do not assess a student's ability to communicate in two languages, even though bilingualism is highly prized in certain high-prestige segments of society such as international business or the diplomatic corps. I have little doubt that, if the tests were changed to include an assessment of bilingualism, many of the current winners in the testing game would be losers and certainly some of the current losers would emerge as winners. This realization keeps test results in the proper perspective for me, and I believe it would do the same thing for school leaders and even thoughtful policymakers (whether or not they had an a priori commitment to promoting social justice) who understand the different paradigms of research that got articulated during the final three decades of the twentieth century.

Summary

In this first section of this chapter, I have discussed the debate about research methods that occurred within the field of educational research during the final quarter of the twentieth century and the implications of this debate for leadership for social justice. Among other things, I described the emergence of a new research paradigm that emphasized the use of qualitative research methods and case study research designs. I also discussed the social justice implications for school leaders of both the case studies that were produced and the new thinking that legitimated the use of case study methodology. In the next section of this chapter, I will argue that some of the proponents of using qualitative research methods and employing case study research designs were wrong when they also rejected the use of traditional *quantitative* methodologies.

Quantitative Methods and Leadership for Social Justice

The question to be addressed in this section, then, is whether the views of research discussed in the previous section—views that both legitimated the use of qualitative research and helped keep social justice concerns in the foreground of many US educators' thinking—require that researchers, especially those interested in promoting social justice, in general, and leadership for social justice, in particular, must eschew the use of quantitative research methods. This certainly has been the conclusion of some social justice advocates. Here, however, I want to suggest that there is nothing *inherently* problematic with social justice-oriented researchers using quantitative methods to study educational phenomena, including phenomena that have social justice implications.

I will make this case by developing three arguments. First, I will argue that many of the negative social justice-oriented critiques of quantitative methods are really critiques of researchers' inappropriate use of quantitative procedures rather than of the procedures themselves; I will argue, in short, that social justice advocates have tended to misdiagnose the problem when critiquing quantitative studies. Second, I will suggest that those interested in promoting social justice actually need *descriptive* statistics to learn about and demonstrate to others the extent of social injustice. Third, I will argue that even quantitative research oriented toward exploring cause and effect relationships can be justified and is potentially quite useful for leaders interested in promoting social justice, despite the naturalistic/constructivist paradigm's dismissal of the notion of causation.

The Misdiagnosing-the-Problem Problem

Empirical Studies Are Never Entirely Empirical

It is certainly the case that quantitative studies in the past have often ended up legitimating the status quo and insuring that groups that are privileged continue to be privileged. Shakeshaft (1989), for example, years ago demonstrated that, historically, the educational administration field promoted male-oriented approaches to leadership that did not fit most female leaders' ways of leading. They did this, in part, because the quantitative research that was used to help define desirable leadership practice almost exclusively focused on male leaders. What we have here, however, is not an inherent problem with quantitative methods. Rather, what we have is a sampling or an overgeneralization problem. In other words, members of the field misapplied the methods they were using and drew conclusions that ignored the rules—in this case, rules about sampling and drawing conclusions that had external validity—of the quantitative research game they were playing.

Shakeshaft (1989), in fact, went on to use the same sort of quantitative methods that earlier researchers had used to study male leaders in her studies of female leaders, and these quantitative methods produced results that allowed her to make a convincing case that, at the aggregate level, at least, female leaders' ways of operating were quite different than the ways of operating employed by most men. Much the same thing could be said about the studies of the so-called cultural disadvantaged youth alluded to in an earlier part of this chapter. While it is certainly the case that the a priori framing of these empirical studies constrained what was looked at and considered and, in essence, predetermined the study's findings about the source of the difficulty, this bias was introduced before any counting began and, consequently, can hardly be used to indict quantitative methods per se.

The problem, here, is that no empirical study is totally empirical. Before we can count, we must determine what counts and, consequently, what to count. None of this means, however, that counting, per se, is inherently problematic. What is problematic is the failure of most consumers of quantitative research to critically examine the way studies were framed and designed and how a priori framing and/or design features skewed the results and the interpretation of results.

Caveats

To be sure, quantification often discourages critique since quantification, in modern societies, often serves to mystify matters (Donmoyer, 2005), even though quantitative researchers claim it is an antidote to mystification and intuition (Antonakis et al., 2004). We are seduced by supposedly scientifically generated reading scores and forget to ask whether the tests used to generate them operationally defined reading in a way that is totally consistent with what we mean by *reading.* Similarly, we ignore the fact that the vast majority of quantitative studies use convenience samples and simply assume that a study's findings generalize to a population, even though there is no logical reason that we should assume anything of the sort when a convenience sample is employed.

And, of course, there is an almost inevitable built-in conservatism associated with quantitative studies that attempt to describe the way the world is, a conservatism that becomes highly problematic when quantitative descriptions of the world turn into prescriptions about the way the world should be. After all, the early educational administration researchers whose work Shakeshaft (1989) criticized for being biased against female leaders undoubtedly did not intentionally discriminate against female leaders and consciously remove them from the samples of leaders they studied. They studied samples dominated by male school leaders because virtually all school leaders, at the time their studies were conducted, were male.

This problem, however, is not a problem for quantitative studies alone. After all, the seminal qualitative study in the educational leadership field at the time, Harry Wolcott's (2003, c1973) *The Man in the Principal Office,* as its title suggests, focused on a man. Furthermore, all of the other principals in the central figure's district who were part of the story Wolcott told also were male. There was not a female in sight in the *The Man in the Principal's Office* because there were no female principals in the district at the time Wolcott conducted his study.

The Bottom-Line Argument About Misdiagnosing the Problem

For a number of reasons, then, it is important that we always *critically* examine all empirical findings—whether they were generated by quantitative, qualitative, or mixed-methods research designs—before we use the findings to make decisions about what ought to happen. At the start of my career, I developed and explored empirically a way of doing this in the form of an alternative approach to evaluation, an approach I characterized as *evaluation-as-deliberation* (Donmoyer, 1991). The approach involved assembling a diverse group of stakeholders who initially viewed a program being evaluated in different ways to help design and, if possible, execute parts of the evaluation study and, ultimately, to translate the study's results into recommendations for policy and practice.

When the approach was piloted in an elementary school, for example, the assembled stakeholder group, among other things, examined the school's reading test scores, but the stakeholder group also examined the tests that had been used to generate them to determine whether they were likely to measure the things that stakeholders associated with the concept of *reading*. (The conclusion, by the way, was that there was minimal overlap between stakeholders' conceptions and the conception of reading that the test-makers apparently had used.) For various reasons, my research agenda headed in a somewhat different direction and I never promoted this approach to evaluation. Unfortunately, our field has created few if any other forums in which the nonempirical aspects of empirical research are critically examined. Such forums are badly needed.

Our failure to critique the nonempirical aspects of quantitative studies, however, is hardly a reason for those concerned with providing leadership for social justice to cavalierly reject the use of quantitative methods. Indeed, as I will argue in the next section of this chapter, there are obvious reasons for social justice advocates to embrace at least some quantitative research designs.

The Importance of Descriptive Statistics for Social Justice-Oriented Leaders

A case study of a gay teenager who has been bullied and driven to suicide understandably tugs at most hearts and makes most people angry. But before action is taken to limit such bullying in other contexts, we normally need to have some sense of whether others have experienced the same problem, and, ideally, we would want to have a systematically generated estimate of how many "others" are having or have had similar experiences.

To make a compelling case for large-scale action, in other words, we normally need descriptive statistics. Consequently, despite what some influential proponents of the naturalistic/constructivist paradigm (see, e.g., Lincoln & Guba, 1985) have suggested in the past, case study research is not the only type of research in which those concerned with social justice research should engage. We certainly need to know about particular contexts qualitatively; but, normally, we also need to know whether what is happening in one context also is happening elsewhere and whether similar occurrences are frequent or infrequent.

In short, those who wish to exercise leadership to promote social justice need quantitative as well as qualitative data. Indeed, it is hard to imagine how social justice advocates could make the case for taking large-scale action to correct problems that lead to social injustice if they did not use descriptive statistics to demonstrate the extent of the problem that needs to be corrected.

The Case for Quantitative Research About Causal Relationships

Making the case for the use of descriptive statistics was relatively easy. After all, even in 1985, Lincoln and Guba cautioned against mixing paradigms, not, necessarily, methods. In addition, researchers who currently are critical of the growing interest in mixed-methods research designs (see, e.g., Denzin & Lincoln, 2005) tend to situate their critiques more at the paradigmatic than the methodological level, and consequently, they seem to leave the door open for descriptive forms of quantitative research. Indeed, it is now commonplace for many qualitative researchers to use quantitative survey results to triangulate their qualitative data (Donmoyer & Galloway, 2010).

It is a bit more difficult, however, to justify the use of inferential statistics and certain types of quantitative research designs that are associated with inferential analysis. I am thinking, for example, of experimental and quasi-experimental research designs that purportedly can reveal cause-effect relationships as well as designs that use modeling and statistical analysis procedures (e.g., multiple regression and hierarchical linear modeling analysis) to systematically estimate the relative contributions that different independent variables make to producing particular effects (i.e., the so-called dependent variables).

The bottom-line problem here for adherents to the constructivist paradigms is the claim that such research designs can produce knowledge of causal relationships (or, in the case of modeling strategies, a reasonable facsimile of causal knowledge). This is a problem, of course, because, as was noted in the first part of this chapter, one of the hallmarks of the naturalistic/constructivist paradigm is the rejection of causal explanations of social phenomena on essentially ontological grounds: The new paradigm, in short, assumes that social action is constructed (and constantly reconstructed), not caused (Lincoln & Guba, 1985).

Here I want to argue that a commitment to constructivism does not require a wholesale rejection of causal thinking and, by implication, a rejection of quantitative research designs geared to exploring causal relationships or to estimating the amount of variance in a dependent variable that a certain independent variables explain. I will ground my case for not rejecting all talk of cause and effect relationships on a comment made by Peter Cohen (1968) years ago while critiquing Peter Winch's (2007; c. 2003, 1990, 1958) classic little book, *The Idea of a Social Science.*

In his book, Winch (2007; c. 2003, 1990, 1958) made the same sort of ontological argument against causal explanation in social science research that scholars like Lincoln and Guba (1985) articulated several decades later. Cohen's (1968) critique did not so much reject Winch's ontological argument; Cohen, in fact, conceded that "one would have to agree that the use of the term 'causation' does not have as precise a reference in the social world as it does in the natural world" (p. 416). Rather, he made an instrumental argument: "If one is to use such criteria," Cohen wrote, "one wonders what is to be offered in place of 'causation'.…In fact, one begins to wonder how social policy would be possible without some idea of causation" (p. 416).

To state Cohen's point another way: The notion of causality can be thought of as a functional (and, in fact, an indispensible) fiction within the policy arena and in many other parts of social life, as well. After all, how could teachers thoughtfully plan lessons or other sorts of educational experiences for their students if they do not, at least at times, think in cause-effect terms.

And more to the point, here: It is difficult to exercise leadership designed to promote social justice if we banish thinking that links leaders' actions with the anticipated effects of leaders' actions. Interestingly, those who came to qualitative research by way of critical or feminist theory have always seemed to understand this point, at least intuitively. This is hardly surprising since it is difficult to support the concept of oppression without, in some way, talking about cause and effect relationships.

Thus, the litmus test for whether we use findings from quasi-experimental or similar types of studies is not whether such studies provide an ontologically correct picture of the social world.[3] Rather, the test must be a heuristic one: Do they suggest ways of leading that are useful, which, in the context of this chapter and the book in which the chapter appears, would mean useful in promoting more equitable and just educational environments? The relevant question, in other words is the following: Even if quantitative researchers are writing fiction, is it a functional fiction?

I would be the first to admit that we do not yet know whether quasi-experimental or statistical modeling types of studies can produce useful knowledge for leaders' intent on promoting social justice. The paradigmatic prohibition against conducting such studies if one is a social justice-minded constructivist has led to a dearth of such studies. Consequently, we do not yet know whether the social world that is constructed (and frequently reconstructed) is sufficiently patterned—or whether the patterns that do exist are sufficiently similar across contexts—to judge whether quantitative studies that attempt to predict relationships between leaders' actions and their effects will provide knowledge that is more helpful than commonsense inferences about cause and effect relationships. What does seem obvious, however, is that there should not be a paradigmatic prohibition against trying to find out whether causal or causal-like quantitative studies are useful as long as we acknowledge that cause and effect accounts of the social world are, at best, functional fictions rather than ontological descriptions of the way the world really is.

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[3] Elsewhere (see, Donmoyer, 2011) I have argued that it makes little sense to even talk about the way the world really is when we assume that reality is always socially constructed. Epistemology, in other words, trumps ontology.

Conclusion

In this chapter, I have attempted to link a concern with social justice, in general, and leadership for social justice, in particular, with choices about research methodology. In the first part of the chapter, I noted that the methodological debate about qualitative and quantitative research that occurred, at least in the United States, during the final three decades of the twentieth century helped keep a concern for promoting social justice front and center in debates about education in the United States.

Furthermore, legitimating of the use of qualitative methods also had two more direct benefits: First, it opened the door for conducting important qualitative studies that documented how social injustice gets reproduced in schools and classrooms and, in the process, alerted educational leaders of things to look for when supervising their staffs and things to listen for when interviewing *potential* members of their staff. Second, the paradigm talk that was used to justify the use of qualitative methods also encourages the notion that social injustice is not natural and inevitable and that leaders and their staffs can remake reality in ways that promote social justice rather than mindlessly reproduce the injustices of the past.

In the second part of the chapter, I suggested that the juxtaposing of qualitative and quantitative methods during the final three decades of the twentieth century and the demonizing of quantitative methods that often accompanied this juxtaposition was more than a little problematic. I developed a three-part argument to support this claim. First, I noted that many of the critiques of quantitative methods were more critiques of their inappropriate use rather than of the methods themselves. Second, I demonstrated that descriptive statistics, at least, are required to learn about the extent of social injustice problems and make a compelling case that some sort of action is required.

Finally, I suggested that even studies that attempt to provide causal explanations (or reasonable facsimiles of causal explanations) could possibly be useful if we think of the results of these studies as potentially functional fictions rather than as ontological statements about the social world. Because few studies of this sort have been conducted to date, the utility of such work for social justice-oriented leaders cannot be assessed at this time. It seems clear, however, that any leader who wants to impact an organization must use some variant of causal thinking to do her or his work.

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Chapter 10
Transforming (Un)Just Institutions: A Reflection on Methodology

Colleen L. Larson

> What is left for us then in this positivist, media-dominated, and self-centered time? How, with so much acquiescence and so much thoughtlessness around us, are we to open people to the power of possibility? How…are we to move them to perceive alternatives, to look at things as if they could be otherwise?
>
> (Greene, *Dialectics of Freedom*, 1988, p. 55)

What role can social justice research play in shedding needed light on the real obstacles that limit the opportunities and life chances of impoverished children and youth? Although the specific obstacles to educational opportunity in the lives of economically disenfranchised people vary widely from one country to the next, this concern for creating real opportunities for poor populations unites many researchers, educators, and policymakers around the world. What role can our research methodologies play in opening people up to what Maxine Greene calls "the power of possibility?"

In the United States, universal access to education is often portrayed as the great equalizer for enhancing opportunity in life. Education is held up as the medium for making the race to obtain prestigious jobs and acquire wealth in a free and open society a fair one. Because all children in the United States have the opportunity to receive government-funded education through high school, many politicians, philanthropists, and policymakers assert that all children in the USA have an equal opportunity to achieve. Therefore, when children do not succeed in this country, their failure is often attributed to differences in individual abilities or ambitions and, more recently, to the incompetence of administrators and teachers, not to vast disparities in *real* opportunities to learn stemming from enduring social and structural systems of injustice. Social justice researchers recognize, however, that the material conditions of children's lives can powerfully limit the real opportunities and freedoms that children have to live lives they want to live.

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Opportunities: Real and Imagined

About 10 years ago, I was asked to write a review of literature on leadership for social justice with my colleague, Khaula Murtadha (Larson & Murtadha, 2002). While mapping the literature on social justice, we came across two books by Amartya Sen, a developmental economist, titled: *Development as Freedom* (1999) and *Inequality Reexamined* (1992). These books pushed our thinking about issues of social justice and the methodologies we use to understand disparities in achievement and lack of opportunity in education in new directions.

Sen challenges the utilitarian assertion that all people are free to choose what they want to do in life. He argues that due to vast disparities in real freedom to pursue the lives they want to live, focusing on achievement (outcomes) alone will never lead to real opportunities for poor populations. Instead, he suggests that social justice researchers ought to examine what people are free or not free to do and then choose policies and practices with the intention of expanding people's actual freedoms to take advantage of available opportunities. People must have both freedom and real opportunity to pursue the lives they want to live.

Sen's argument immediately captured my attention because it so thoroughly resonated with what I was witnessing in my own research and in that of my colleagues. However, I never framed the problems that poor families and their children were confronting as problems of freedom. When I read Sen, I realized how central this notion of freedom is to the United States strong yet largely unexamined belief that all people are free to achieve if they are willing to work hard. This pull-yourself-up-by-your-bootstraps ethic of rugged individualism was launched in US economic theory with full force during the Reagan years under the tutelage of Milton Friedman (1980), an economist and a strong advocate for free unregulated markets and laissez-faire economics. To Friedman, true freedom can only thrive in societies that allow the market to generate wealth. He sees the wealth that people acquire as earned, overlooking inherited wealth entirely, and claims that in an open society, all people can acquire wealth if they choose to do so. Toward that end, Friedman believed that all people should have an opportunity to compete; however, he paid little attention to how large inequalities in material conditions undermine the actual freedom that individuals have to pursue available opportunities.

This belief in equality of opportunity underpins much of current education policy in the United States, including the "*No Child Left Behind*" legislation and more recently the "*Race to the Top"* competition. Both of these initiatives emphasize creating greater equality of opportunity through increased accountability and universal achievement standards while ignoring vast disparities in the actual freedoms that children and youth have to achieve.

Challenging Friedman, Sen argues that the utilitarian notion of freedom as non-interference is often good for wealthy people; however, for the poor, it is problematic. He argues that when the needs of poor people are at issue, freedom requires more than the absence of interference from the federal government or from their state or local institutions; rather, it requires creating more suitable conditions so people have greater freedom to pursue available opportunities.

At the time I was reading Sen's book, I remember feeling frustrated by the stories my students, many of whom are teachers, administrators, and policymakers in education, were telling me about their work in schools. I struggled to make sense of federal educational policies and local practices that were forcing many impoverished and immigrant children and youth of New York City into an appallingly emaciated form of education centered on high-stakes testing, pushing many of them into a vicious cycle of remediation, failure, and retention. Children who have been in this country for just 1 year and do not speak English are now required to take standardized, high-stakes tests in English, while others are forced into taking tests that their teachers know they cannot pass. This city's obsessive use of tests and teaching practices that focus on outcomes has reduced classroom activities in most schools serving impoverished and immigrant children to test preparation and to learning how to take tests rather than actually learning. Rather than increasing many children's freedoms and opportunities to learn, these policies are now blocking teachers from engaging their students in more compelling and pedagogically meaningful ways.

Anybody who spends any period of time observing children and talking with teachers in schools serving poor and immigrant children in NYC schools today can quickly surmise that this focus on equality of achievement while ignoring enormous inequalities in social, cultural, economic, and political conditions is problematic; Sen's work helped me to see how central the issue of freedom and unfreedom is to creating *real* rather than imagined opportunities for poor populations.

Sen's capability approach coupled with Martha Nussbaum's elaboration of this approach through child well-being, which I discuss later in this chapter, offers methodological guidance for examining issues of social justice in education. Increasingly, researchers are turning to the capability approach to understand what human beings really need if they are to have meaningful opportunities to learn and pursue lives they want to live. However, most of the research on the capability approach has been done in economics, employing quantitative measures to examine issues of freedom and capability.

In education, quantitative research is important for capturing and measuring disparities in outcomes (achievement); however, it is less useful for capturing how the freedoms or unfreedoms in children's lives may limit academic achievement, resulting in massively disparate outcomes. For example, a quantitative study may find that poor black children perform poorly on standardized reading tests when compared with their white peers, highlighting differences in test performance (outcomes); however, it provides no significant insight into how the lives that children live in low-wealth neighborhoods or how the institutional structures and practices of the schools they attend either enhance or undermine children's *real* freedoms and opportunities to achieve. To capture the processes that produce or impede freedoms to achieve, we need in-depth ethnographic and case study research.

The capability approach is valuable for illuminating how the lives that children live affect their sense of agency, well-being, social identity, aspirations, and freedoms to achieve. It also reveals the choices they make as well as the choices they are free to make. These are just a few of the key concepts within the capability approach.

Ethnography and case study projects focusing on individuals, schools, and communities can reveal how prevailing discourses, policies, and practices actually enhance an individual's freedom to choose what they want to do, which increases real opportunity, which can be converted into actual capabilities which lead to enhanced functioning in society.

Background and Purpose

Over the past 10 years, I have explored several paths to operationalizing the capability approach. As I watched my doctoral students struggle to use this framework, I recognized the need to clarify central methodological concepts in the capabilities approach like "capability," "freedoms," "unfreedoms," "agency," "choice," "deformed choice," "child well-being," "bodily integrity," and "functionings," to name a few. Because I believe that Sen and Nussbaum's focus on issues of freedom, capability, and well-being is so central to social justice research, my research team and I have worked together to make these concepts clearer and more accessible to other social justice researchers (Larson, forthcoming). I have found this lens useful in my own research and in my work with a cadre of doctoral students who have joined me in this effort to examine issues of freedom, choice, and opportunity in education.

However, like Gareth Morgan (1997) I recognize that "A way of seeing is a way is also a way of not seeing." This means that any inquiry approach or process we choose will help us to see some things and prevent us from seeing others. In this chapter, I demonstrate how a way of seeing can also be a way of not seeing by revisiting a case study that I did almost 15 years ago, prior to learning anything about the capability approach, and raise questions about my methodological choices in light of the capability approach. I examine how my methodological choices might have been different had I been using the capability approach to make meaning of what occurred in that study. I show how the capability approach, with its emphasis on child well-being, directs the researcher's attention to the children that often get silenced in critical studies focusing on systems of power and discuss how a greater attention the embodied child might have changed what I considered important to pay attention to in this study. I suggest that the capability approach provides a powerful and compatible methodology to use in combination with other critical research frameworks and keeps the researchers' eye appropriately focused on what is happening to children in our schools.

This chapter, I portray the capability approach for social justice and discuss why this framework is useful for researchers who are pursuing social justice issues for children and youth. Next, I discuss the methodologies that I have used to guide case study and ethnographic research prior to using the capability approach and show how this lens frames shifts the lens of inquiry in interesting and important ways. This portrayal shows how the capability approach aids researchers in exploring questions and areas of social justice that are often overlooked in social justice projects.

Finally, I examine what I have learned, in collaboration with my colleagues, about using the capability approach as a process for creating a greater conscious awareness of what is happening in schools and discuss research processes that make participants allies in unpacking the controlling discourses that often unconsciously shape professional practice. I also discuss how my colleagues and I have operationalized a few of the key concepts in the capability approach and offer illustrative examples from current projects.

Education as Development: The Capability Approach and Social Justice Research

In this section, I discuss the capability approach to social justice and portray some key concepts that ground this inquiry. The writings of Amartya Sen (1992, 1999, 2004) and Martha Nussbaum (1999, 2000), who elaborates Sen's work by focusing on the ethical dimensions of social justice and child well-being, are central to this discussion.

In *Inequality Reexamined* (1992), Sen argues that an individual's position in any social arrangement can be assessed in two distinct ways: (1) actual achievement and (2) freedom to achieve. "Achievement" is what an individual accomplishes or, said differently, the measurable outcome. However, having the "freedom to achieve" requires having the *real opportunity* to do what one has reason to value.

Sen's focus on freedoms to achieve directs the researcher's attention to what he calls the "freedoms and the unfreedoms" in the lives and daily realities of poor families and their children. By examining the unfreedoms that children and their families endure, researchers can shed better light on the *real* choices available to impoverished people. Sen argues that these choices can be severely limited, often leaving them with nothing more than what Nussbaum calls a "deformed choice" or, said differently, no choice. When people can see no way to accomplish or do what they really want to do, they often change their goals, making "adaptive choices," or what they perceive as more realistic goals given the realities of their situation. By identifying the unfreedoms that prevent many impoverished children and their families from doing what they would do if they had a real choice, social justice researchers can methodologically shed needed light on the often taken for granted belief that all people are free to choose the lives they want to live, if they are willing to work hard.

Some children in the United States are born into enormous wealth and privilege, while others live in conditions of considerable deprivation. Economic inequality in the United States is now greater than it has ever been in this country (Wolff, 2009). Wealth, just like health, political freedom, and physical safety, gives human beings greater freedom to choose and pursue what they want to do in life. Financial resources, for example, afford privileged children who aspire to college the freedom to focus on educational achievement without needing scholarships or work to support their studies.

Sen points out that the varying advantages and disadvantages that individuals possess impact the freedom they have to do what they want to do. He reminds us that when analyzing opportunity, economic resources like wealth and income are important to examine but so too are other indicators like health, human connection, human rights, and quality of life to name a few. The choice of evaluative space, or what we choose to pay attention to, is crucial to analyzing inequality and to developing public policy that is geared toward enhancing greater *freedoms to achieve* for people whose freedom can be severely diminished by the economic, social, political, and/or cultural context of their lives. Sen's focus on *freedoms to achieve*, rather than on achievement or outcomes alone as a path to human development, has clear ramifications for how we examine issues of social justice in education.

When researchers focus on a child's freedom to achieve and not just on the level of achievement, they can surface the disparities in *freedom* that lead to inequalities in educational achievement. For example, when a child's single mother loses her job and her family is forced out of their home in search of a new one, both the mother and the child's freedom to focus on education is severely diminished.

Poor families are often thrown into survival mode in a volatile secondary labor market where parents work two and three jobs and without benefits to support their families. These parents do not have the same freedom to focus on education, support their children academically, or provide opportunities that lead to the levels of achievement that parents in the professional and primary labor markets, typically, enjoy. Similarly, children whose families are new to this country and do not speak English, generally, have diminished opportunities to develop the skills they need prior to taking high-stakes tests in a language they are just beginning to learn. Nevertheless, because immigrant children are required to take all achievement tests in English after being in this country for just 1 year, despite the fact that research has shown that it takes several years to learn and use a new language, federal policy has essentially limited the real freedom that many children have to learn. Through these examples, we see that although all children may share the desire to do well in school, they do not all enjoy the same freedoms to achieve; children who are economically advantaged and have parents who are educated and speak English, typically, have far greater opportunities to succeed in school and develop the capabilities they need to create the lives they want to live.

Coming from an ethical rather than an economic perspective, Martha Nussbaum (2000) argues that insufficient attention to important aspects of individual lives also leads to harmful policies and practices. The outcomes-based approach to improving education in the USA today, for example, places absolute emphasis on test preparation and high-stakes testing, particularly in low-wealth communities where children are most likely to fail tests that were never written with them in mind. From a capability perspective, universal testing and uniform standards are problematic because the contexts of children's lives are neither universal nor equal. This insight is particularly important in education.

This nation's push for greater generalizability in research has resulted in decontextualizing children's lives and proceeding as if their minds can be educated without paying attention to the physical, emotional, or cultural realities of their life world.

Rather than seeing children as human beings in much of our research, children are forced into social scientific categories that measure their intellect and ability but deny their humanity as children in need of social, emotional, physical, and material support.

Concerned with child well-being and capability development, Martha Nussbaum (2000) argues that emotional and bodily integrity and the well-being of children and their families ought to be central in research efforts seeking to understand and enhance learning opportunities for impoverished youth; these issues are undeniably central to enhancing not only the educational achievement of children, but also to enhancing their overall life chances.

Nussbaum points out that how researchers frame and address the problems that limit children's opportunities to do well in school can be crucial to either expanding or narrowing their life options. For example, in schools, Nussbaum encourages researchers to ask: How do the lives that children and their families live affect their *real* opportunities to focus on education? How do the school, the government, and the broader society frame the problems that poor children and their families are experiencing? What social and educational policies are emerging from these ways of framing the problems of impoverished families? And how is this framing of these problems affecting their education, well-being, and life chances?

Nussbaum's theory of social justice and capability development encourages people to understand and respond to the injustices they see in a morally just way. Like Sen, Nussbaum argues that insufficient attention to cultural differences and the particular features of individual lives results in unjust and harmful policies and practices. Therefore, she compels researchers and practitioners to consider how the capabilities of individuals ought to be supported through social and educational policy and institutional practice. In schools, for example, this requires seeing children and their families as human beings first, not simply as students and parents. When we label people and confine them to institutionally assigned roles as parents, students, administrators, or teachers, for example, we diminish their humanity as well as our own by limiting our interactions in role-specific ways, rather than seeing others and ourselves as *human beings*.

Noddings reminds us that when people assume roles in institutions, they also tend to narrow how they see what is expected of them. For example, when educators become principals or teachers in schools, they often adopt role-orientated ways of being that limit how they think about their relationships with others in the context of their work. People often become less willing to engage with people as human beings. Noddings asks us to consider: How would our work in schools be different if we thought about what we did as entering relationships with children and families rather than as assuming roles as teachers and administrators? For example, if a child's family suddenly becomes homeless and the child misses several days of school, educators focused on attendance requirements may see this problem in institutionally narrow ways, framing the problem as the *student* is missing school, rather than the *child's* family is in serious trouble and needs support. Our institutional framing of societal problems can often fail to recognize and address the most serious problems confronting the lives of children and their families. The reality is that human beings, both children and adults, have social and material needs that must be met if children are to thrive in school as well as in life.

The Well-Being of Children and Youth

A capability researcher, then, is interested in what people are actually free to do and become. Nussbaum directs our attention to the lives of people as embodied beings. She reminds us that the minds of children, for example, cannot be educated when their bodies are threatened. This means that the physical, social, and emotional lives of children and adults are important to address in any serious effort to examine and enhance the life chances of children and youth.

Nussbaum argues that in a just society, people should be able to live a human life of normal length, without fear of dying prematurely in gang-controlled communities or in situations where they feel their lives are no longer worth living. She asserts that a person should be able to enjoy good health, good nutrition, and adequate shelter. They should be free to move from one place to another without overwhelming fear for their safety.

In education, Nussbaum points out that: "Children should be able to use their imaginations and their senses, to imagine, think, and reason—and to do these things in a truly human way, informed and cultivated by an excellent education that spurs imaginative and critical thought and opportunities to experience and produce inspiring, artistic, creative, and transformative works."

She also sees the importance of developing capabilities for understanding and coping with human emotion. She points out that being able to develop attachments to others, and loving those who love and care for us, is vital to healthy human growth and development. Human beings also need to be able to grieve when they cannot be with those they love and to experience longing, gratitude, and justified anger. Injustice, she suggests, arises when an individual's opportunity for emotional development is thwarted by overwhelming fear and anxiety, as well as by traumatic incidents of abuse or neglect. These insights, are crucial for educators who work with students who often experience enormous grief and loss in an educational context that pushes all things human beyond the classroom doors in an effort to increase time on task and raise test scores.

Finally, Nussbaum reminds us that in a just society, a person should be capable of practical reason. This means that people ought to be able to imagine living a life they have reason to value and be capable of engaging in critical reflection about the planning of that life. If children are to live full lives, they must learn to care about other human beings. They must be capable of engaging comfortably in a variety of social situations. Nussbaum states that: "They must have opportunities to laugh, to play, to enjoy recreational activities, and to be capable of imagining the situation of another and having compassion for that person. They must also have the ability to form and sustain meaningful and supportive relationships. Finally, children and their families, no matter what their material circumstances in life, need the social footing that allows them to develop self-respect and the experience of being treated as people of equal worth and dignity" (Nussbaum, p. 12).

Nussbaum's list of capabilities that children need to come into full well-being is motivating and inspiring. Certainly, children must also be able to read, write, and do math. However, as she points out, they need much more than this if they are to reach for full and happy lives. Nussbaum's robust list of what children need to know and be able to do awakens us to just how thoroughly we have narrowed the purposes of education and what we believe children ought to be able to know and do over the last three decades. But it is important to recognize that we have not narrowed the capabilities we want to develop for everyone, just for the children of the poor.

Unlike public schools, private schools have a choice in the students they will accept. In elite private schools, acceptance weighs heavily on family name and money rather than on academic ability, and the curriculum is not driven by the confining federal mandates of *No Child Left Behind;* rather, it focuses on what is needed to help one live the life one chooses: For example, a child attending the new elite Avenues School in Manhattan (http://www.avenues.org/world-school?adidnum=g_new_ws&gclid=CNGrwfKJ0a4CFYuK4Aod-zEJgA) will enjoy a curriculum that "recognizes the importance of educating children who are well rounded human beings, capable of living in today's world and free to explore their unique gifts and talents." Their mission is to:

> Graduate students who are accomplished in the academic skills one would expect; at ease beyond their borders; truly fluent in a second language; good writers and speakers one and all; confident because they excel in a particular passion; artists no matter their field; practical in the ways of the world; emotionally unafraid and physically fit; humble about their gifts and generous of spirit; trustworthy; aware that their behavior makes a difference in our ecosystem; great leaders when they can be, good followers when they should be; on their way to well-chosen higher education; and, most importantly, architects of lives that transcend the ordinary. (See Website)

Why, I wonder, isn't this the mission driving the capabilities we seek to develop within all children? Payne and Biddle (1999) rightly point out that because the life choices for disadvantaged groups can be severely limited by poverty, and I would add by the impoverished education that we are giving poor children, the United States has a glaring economic divide in opportunities and capabilities.

If researchers and policymakers recognized the importance of these capabilities and the roles they play in enhancing the real freedom that children have to focus on educational opportunity, how would this shape the way we do research and design social and educational policy? In the next section, I discuss what I have learned in collaboration with my doctoral students and colleagues about using the capability approach to shed greater light on social justice issues in education and pose some questions about normative methodological practices in social justice research.

Putting Freedom and Choice at the Center of Inquiry: Reflections on Methodological Choices

Over the past 10 years, I have used several approaches for guiding students in thinking through the methodology they use in light of the capability approach. Over time, I began seeing how the capability approach significantly aligned with other social justice methodologies I used, previously, and raised new questions and triggered important insights within these social justice projects. Because the capability methodology for social justice has not been used in field-based studies, I became more attentive to seeing how my preferred methodologies helped me or limited me in examining social justice issues from a capability perspective.

When I began doing studies of equity and opportunity in schools and communities, I was drawn to Norman Denzin's (2001) methodology, interpretive interactionism. Based on the writings of C. Wright Mills, this framework illuminates the difficulties that people often encounter in the institutions that exist to serve them.

Denzin's constructivist methodology synthesizes symbolic interactionism, hermeneutics, and biography. Although Denzin's approach to inquiry speaks directly to how alcoholics are treated by the social service agencies that exist to help them, this methodology is very applicable to examining issues of social justice in education. Denzin suggests that interpretive interactionism is most useful when examining "the relationships between personal troubles (such as wife battering or alcoholism) and the public policies and public institutions that have been created to address those troubles" (p. 2). However, from a capability perspective, I have found that the freedoms and unfreedoms that poor children and their families encounter in schools are, also, illuminated in important ways using this framework.

Denzin's interest in focusing on the individual to understand personal troubles aligns well with Sen's insistence that the lives of individuals, rather than groups, are most important for understanding issues of freedom, opportunity, and choice. The notion that individual problems are often rooted in how they are perceived by people working on behalf of institutions is central to this framework. Using this methodology, researchers can reveal how administrators and educators frame the problems they encounter with impoverished children and their families as well as how this framing determines whether children's real opportunities and life chances are helped or harmed by the actions of policymakers and school officials. Although schools exist to increase a child's opportunities and life chances, this is not always what happens.

This framework, then, is particularly useful for capturing how the policies and practices of those who work in schools can diminish or enhance the life chances of many children. Researchers must pay attention to how institutions help children as well as how they may hamper their real freedoms to achieve.

Like Nussbaum, Denzin asserts that the problems that many people encounter in institutions emanate from a gap in understanding between what the people designing policy think people need and what they really need. He focuses researchers' attention on how people come up against problematic policies and practices that often create injustice in institutions rather than enhance opportunity and freedom.

This approach to inquiry stresses the importance of capturing deeply personal and contextualized accounts of the troubles that people encounter in institutions. Denzin argues that because of the emphasis on personal biography and thick description of lived experience, this approach helps researchers to understand programs and the educational experience from the point of view of the persons most directly affected by them—the clients.

To Denzin, personal narratives drawn from the local context are central to understanding human intention and action. By illuminating gaps in understanding between the institution and those they are trying to help, people working in institutions can become more conscious of why their failure to take into account the lived realities, perspectives, and problems of the people they serve often results in ineffective, harmful, and unjust policies and practices.

The researcher's goal in interpretive interactionism is to capture the in-depth, biographical experiences of individuals who rely upon an institution, like a school, for support and to understand how they make sense of their experiences with the institution and with those who work on its behalf. A second goal of this approach is to understand how those who work in the institution make sense of the problems they encounter with the people they serve and to see how this framing shapes the experiences, freedoms, and life chances of those they serve.

Denzin values capturing the deeply contextualized experiences of those who rely upon institutions in-depth, arguing that public and institutional policies will fail if they do not correctly identify the real needs of the people these policies are designed to help. He reminds us that:

> Troubles are always biographical. Public issues are always historical and structural. Biography and history thus join the interpretive process. This process always connects an individual life and its trouble to a public historical social structure…strategically, the researcher locates epiphanies in those interactional situations where personal troubles become public issues. (p. 38)

Strategically, then, while talking with people about their lives and the difficulties they are experiencing, researchers encourage participants to recall epiphanic moments that they encountered in their interactions with people who work on behalf of institutions. An epiphanic moment is a time of crisis or awakening. It is a turning point in one's life that often makes it impossible for the individual to see life in quite the same way again. Denzin suggests that epiphanic moments have the "potential to create transformational experiences" (p. 34). Therefore, through this methodological framework, researchers can capture the stories that shape the lives and life chances of people as well as the role that institutions play in helping or harming them.

Looking Back: Reframing the Land of Oz

Long before I discovered the capability approach, Denzin's focus on epiphanic moments compelled me to use his framework in an article titled: "The Land of Oz: A Sociopolitical Study of School Community Conflict" (Larson, 1997). The conflict in this community arose when several young black students protested against racial injustice in their high school and were suspended for doing so. Jefferson Heights High School, a historically white school community, suspended the students for performing an unauthorized act at the talent show; however, in their defense, the young men argued that, despite repeated efforts to do so, they could not get the teachers or administrators to pay attention to their concerns about racist practices in the school. This protest became a moment of crisis or, as Denzin suggests, an epiphanic moment that awakened a previously cooperative black community to school practices that marginalized and demeaned their children in the school—practices they would no longer tolerate. In this case study, this protest and how people made meaning of that event became the pivotal issue in a political conflict between the administrators and leaders of the black community.

By talking in-depth with people who worked in the school as well as with those who sent their children to the school, I captured two very different but coalescing ways of framing this protest. The administrators saw the protest as bad behavior by troublesome students, and the black community saw it as a justifiable response to racial injustice in the school.

When I look back at this study today in light of the capability approach, I realize that the voices of students, the ones who truly came up against the system in this school, are clearly missing. Although I did discuss how the young men's real freedoms were diminished by the choices the administrators made to suspend them, this study focused largely on the political battle between adults, the administrators, and the black community. As a result, the young men are talked about, but their experiences and voices are largely silenced in this study of political struggle.

In looking back at this study, I realize that if I had used the capability approach to analyze this story, I would have paid more attention to the young people who participated in the protest. Instead, this study focused on how the black community and the religious leaders came up against the administrators of Jefferson Heights High School.

In reflection, I realize that the adults drew me into this political struggle, and they quickly framed this conflict as a problem between them, which pushed the students to the sideline and essentially silenced the students' voices. In revisiting this study in light of the capability approach, I recognize that the way I told the story of Jefferson Heights captures one possible story line, but it also fails to capture another critically important story.

Although, Denzin's framework is very useful for social justice research, I see now that the capability approach would have directed my attention as a researcher much more unswervingly on how students' capabilities were being developed or diminished in the school. Schools exist, after all to develop the capabilities and enhance the life chances of children and youth. If I had been guided by the capability approach while doing this study, I would have been more in tune with talking to the young men who had organized and participated in the protest. I see how the capability approach would have helped me to examine the choices as well as the deformed choice they felt forced into making as students in a school that did not welcome them. The capability approach would also shed greater light on how their relationships and interactions with teachers and administrators shaped their opportunities, life chances, freedom, and sense of agency, to name a few.

Looking back, I see missed opportunities for capturing the voices of these students and for creating a greater conscious awareness of the daily lived experiences of young people, many of whom were being bused into this white suburban community from the nearby city. I see how I could have mapped the choices, deformed choices, and adapted choices that these young people made as they struggled to be seen by their teachers, culminating in a protest at the school talent show.

Although I did capture students' voices in snippets, their stories and their voices did not have center stage, even though they deserved it. For example, at the public forum where the black community gathered to air their concerns about the school system, the words of one young woman haunts me still, hearing her say to her teachers "You don't love us." The capability approach directs researchers' attention to the very human, relational, emotional, and intellectual well-being of children and youth. In light of the capability approach, I realize that I didn't tell the story of the young people who had the courage to protest against racism in their school in Jefferson Heights. Instead, I told the political story of how their parents and community fought the way the school framed the student's actions. This story was also important and interesting, but when I methodologically reframe this study, I realize that I lost something very important in not focusing more on the stories of these young people and what they were experiencing in their school.

Although interpretive interactionism and the capability approach are both methodologies rooted in concerns for social justice, the capability approach offers researchers a much more robust portrayal of how to see injustice in the life and life circumstances of an individual child. Nevertheless, these two frameworks work very well together, and I still find Denzin's framework very useful, but Nussbaum's focus on child well-being fully shifts the social justice analysis to the needs and lived realities of children and youth and I think this is appropriate. If our current federal policies and the thinking of teachers and administrators are to change, the stories of children need to be told. Children's stories reveal their feelings of belonging and connectedness in schools or their feelings of rejection and isolation. These feelings are critical for capturing what makes children feel a part of or a part from their schools.

Researchers, who are concerned about improving the lives of economically disenfranchised children and youth, focus on economic, social, cultural, and political systems of oppression, which are critically important to engaging in social justice research. However, in examining those systems, the capability approach, with its emphasis on freedom and well-being, reminds researchers not to lose the voices and experiences of individuals, particularly the children in our studies of systemic inequality. Ethnographies and case studies that capture the embodied experiences of children in education are needed.

In the next section, I discuss embodied inquiry, and provide insight into how the capability approach enhances researchers' abilities to understand the deeply contextualized notion of "opportunity" in the lives of impoverished children and youth.

Making Bodily and Emotional Integrity Central to Inquiry

In recent years, my colleagues and I have used the capability approach to capture the voices of children in greater depth. These stories shed important light on why educational policy decisions are often so problematic in the lives of poor children and their families. Yet, policymakers tend to see their policy decisions as educationally sound and eminently rational. For example, New York City's Mayor Michael

Bloomberg argues that children who cannot read at appropriate levels in English should not be socially promoted to the next grade. Although this argument often enjoys popular public appeal, researchers know that retention is problematic because of the extreme emotional and relational trauma that it inflicts on children and their families. However, research did not deter the mayor from passing a mandatory retention policy affecting any child that failed to pass the third grade standardized tests in Math and ELA.

In a study focusing on children in New York City who were retained in third grade based on this policy, we learned just how profoundly children's lives were affected by this decision. Guided by the capability approach, this study takes an embodied look at children's experiences with retention (Wells & Larson, forthcoming). For illustrative purposes, I portray a brief excerpt from the story we tell about Marcus, one of the children who was retained:

> Marcus is an only child. He is the only person in his family who speaks English. His parents are first generation immigrants from Honduras, making Marcus a first generation Honduran-American whose parents came to the United States for better opportunities. Marcus has absorbed his parent's high aspirations, saying confidently:
>
> > I want to be a doctor, because doctors are smart and they type in the computer fast, and they know what medicine to give you. And when people got dandruff they give them a special shampoo.
>
> Marcus enjoys talking about his dreams for the future. He welcomes the opportunity to being transported in time to another place because his life, now, particularly, in school, makes him sad. He recalls that his life took a bad turn when he was told that he would not be promoted to third grade.
>
> When we asked Marcus how his parents responded to the news that he had to repeat the third grade, he closes his eyes tight, trying to hold back his tears, but soon they are spilling rapidly down his cheeks. Using the cuffs of his shirt, he quickly wipes them away. Marcus is now a fourth grader, and although he eventually passed his third grade test and he was promoted to fourth grade well over a year ago, the emotional memory of failing third grade quickly brings him to tears. Marcus remembers how he was told that he had failed his English Language Proficiency (ELA) test and that he would have to repeat the third grade:
>
> > They sent my father a letter in the mail. It said, 'Marcus repeats the third grade.' That is when I got a two in math and a one in ELA. I was mad at ELA. I ran into the hallway, and I was crying. My mom hit me in my face because she does not like it when I cry. Every time I get left back I cry and then my mom and dad hit me. They hit me with a belt and that hurts. I went into my room and I was crying and she was yelling to my father about me in Spanish.
>
> Marcus and his parents learned through the mail that he had failed 3rd grade and had been targeted for retention. The school system treated the retention of 1,500 third grade children as a business transaction, generating form letters and sending them to parents as if the news delivered in these envelopes was unproblematic. Marcus's teacher did not call them, nor was there a request for a special meeting to discuss either the issue of retention or Marcus's performance in 3rd grade. The letter revealed only that Marcus had received the lowest score possible, a one, on his English Language Assessment (ELA). As the only person in his family who speaks English as a first language, Marcus failed his English language test.
>
> Marcus remembers crying when he learned that he had failed 3rd grade. To his Mother and Father, crying about failing was as big of an offense to the family as failing. Like most Latin American countries, Honduran culture embraces a standard of hyper-masculinity

> for boys. This means that any sign of weakness in boys can be treated harshly. Marcus was hit by both parents that day not only because he failed, but because he cried about failing. He confides, "I do not think my father loves me anymore." Marcus' interactions with his parents since the letter arrived in his home make him feel that he is no longer wanted. He says in a sad, low voice:
>
>> It feels like I do not even live in my own house. Like I am left out, like I am lonely, and I have nobody. That is how I feel.
>
> Marcus is clearly in a fragile and emotionally raw place. One assumption underpinning mandatory retention is that if children are held accountable for their own education, they will work harder to improve their academic skills. However, Marcus's story, which is only told briefly here, reveals that as a child of immigrant parents, he does not lack the will to do well. He is trying hard to do his best. But being retained in third grade was a much more profoundly humiliating experience for him and his parents than Mayor Bloomberg could ever envision given his view of retention as unproblematic in light of his greater concern for avoiding social promotion. Now, even though Marcus is in fourth grade, his previous retention continually haunts him, and he fears failing again.
>
> Increasing pressures to achieve are not increasing Marcus' abilities to perform well on timed tests. Marcus can recall a time when he loved reading in second grade, but now he hates reading and freezes whenever he takes timed tests. His teacher is not hopeful that Marcus will pass his fourth grade tests. Marcus remembers that he once enjoyed school, but that is no longer the case. Although he is just 11 years old, his experiences in school are not good, making him feel rejected, unloved and defeated.

Children suffer enormously when institutions, like schools, harm rather than help them, and yet their voices, which can reveal so much about problematic policies and practices, are often silenced even in studies focusing on issues of social justice. Through Marcus' story, we achieve critical insight into the limitations of policies and practices that ignore the importance of embodied sensemaking.

Denzin's framework does not address issues of bodily integrity. However, Nussbaum points out that human beings interpret their lives in embodied ways. Because we are embodied beings, there are no human thoughts that are not mediated, first, by the human body. Reasoning, thinking and sense making, then, are not disembodied processes, rather our mind and body are unavoidably linked, and sense making occurs from an inseparable comingling of our brains, bodies, and embodied experiences. Lakoff and Johnson (1999) point out that these insights are coming from congnitive science and they are not "the innocuous and obvious claim that we need a body to reason; rather, it is the striking claim that the very structure of reason itself comes from the details of our embodiment, including our emotion (p. 4)." In light of this framework, it's interesting to note that leadership literature tends to frame the actions of school leaders in rational and disembodied ways. However, this way of framing the actions of school leaders overlooks how powerfully the body and fear of bodily harm or professional failure, for example, influences the actions of school leaders and educators.

When I look back at the narratives of the administrators and teachers in "The Land of Oz" study, for example, I am struck by the differences between the administrators disembodied "role stories" and their very embodied human stories of what they were experiencing during the political conflict with the leaders of the black community. When I compared the stories that I was told early in this study to those

I captured later in the study, I saw how the language shifted from rational mind states of order and control such as "we stopped," "we punished," and "we suspended," to, over time, more embodied feelings of chaos and the emotions of fear such as "it was frightening," "I felt threatened," and "we were afraid."

Carl Rodgers, a central figure in existential psychology, once said that there are really only two emotions: love and fear. All other human emotions are derivative of these two emotions. Anger, guilt, and revenge, for example, are all forms of fear. Rodgers argues that if people are not acting out of love, they are acting out of fear. Because our dominant patriarchal image of the high school principal is still one of a strong, stoic male figure, not unlike leaders in the military, researchers, and I include myself in this, still tend to focus on the disembodied mind states of those who lead our schools. It's not surprising then that research studies that examine the embodied stories of school principals who fear for their own physical safety or who fear failing as a leader in the building are difficult to find. And even though many leaders working in today's schools harbor these fears, they seldom express them. Researchers may also be complicit in producing images of disembodied school leaders because we fail to examine how the very human, relational, emotional, and physical aspects of our humanity shape our way of being in the world. In light of Nussbaum's framework, I see that embodied feelings of fear, for example, are important for understanding how principles, teachers, and students interact with others and how these interactions shape the choices they make.

Denzin's framework helps researchers to capture rich and revealing portraits of the many gaps between what children and their families need and what policymakers, educators, or social service providers think they need. I have found that, for the most part, the capability approach, which examines issues of freedom, choice, and opportunity, for example, enhances Denzin's framework in very compatible and important ways.

For example, in a study of an upward bound program (CAI), we used Denzin's framework to examine why many young men were leaving the program prior to graduation (Anderson & Larson, 2009). How were these young men experiencing the program that existed to help them graduate from high school and go on to college? In this study, we saw young men reaching for the opportunity to succeed in school and go on to college, but they often found themselves in difficult circumstances that demanded their attention. Nussbaum points out that deformed choices often force people into doing what they really do not want to do and what they would not do, if they had a real choice in the matter. In this study, we met Miguel a confident, capable, and motivated Dominican student who was eager to finish school and go on to college. However, his school plans were disrupted when family problems sidetracked him from that goal. He recalls:

> My mom was real sick. She had a tumor in her uterus and she had to get it taken out. So she was in the hospital for a while, and then she was home because she couldn't work. She was real tired and had to stay in bed. So I had to bring her stuff and cook for us. She had to go to the doctor a lot so I was picking up my little brother from school and taking care of him, and my dad had to work a lot. I was tired all the time. Plus I had schoolwork. I went from a B in one class to a D in only a few weeks. I was also missing CAI a lot. People were

> asking me, “Yo Miguel why didn’t you come yesterday? And it was too much. I really wanted to come, but I just didn’t have time….I tried to come a couple of Saturdays, but it was too hard. I was just sinking. You know how quicksand is? It takes you under.

When Miguel’s Mother became ill, the family needed to depend on him to take over his Mother’s duties, cooking, cleaning, caring for his little brother, as well as taking care of his ill Mother. His dad worked long hours to make up for his wife’s lost wages, so the burden of caring for the family fell to Miguel. Poor families can ill afford medical emergencies. Many families in this country are just one medical emergency or one job loss away from homelessness. Given that many families lack needed resources during times of unanticipated illness or job loss, poor families often have to lean on older children to care for younger ones when illness or unemployment strikes. This is just one of the illustrative examples of the many ways that poor children and their families get caught in difficult life circumstance that take away their *real* freedoms to focus on learning and going to college.

In the next section, I discuss another methodological lens that makes a valuable and needed contribution to the analytic palette of critical researchers, institutional ethnography, and show how the capability approach can also enhance researchers’ lenses of inquiry in these research projects.

The Freedoms of Educators and the New Social Organization of Schools

In using Denzin’s methodological framework and the capability approach, my colleagues and I have captured the in-depth life stories of children and parents as well as those of teachers and administrators, illuminating how the freedoms and opportunities of children and youth are enhanced or limited by their life circumstances at home or by normative institutional practices in schools. When our studies illuminated troubling policies and practices in schools and classrooms, we provided a needed critique of local practices that were narrowing rather than expanding children’s opportunities to learn; this is what critical scholars do. However, in working with administrators and teachers in the field, we began to notice that many of the teachers and administrators who participated in these studies also felt troubled and conflicted about the work they were doing in their schools and classrooms. Through conversations with our participants, we began to see how powerfully the practices of NYC educators at the local level were, increasingly, being shaped by societal discourses and texts beyond the school level, or what Dorothy Smith calls the “trans-local” and “ruling relations” that shape what people think and do.

We began to see just how disempowered many NYC educators were feeling in this *No Child Left Behind* era of educational reform. We witnessed the growing sense of futility that many administrators and teachers were experiencing in their efforts to make a meaningful difference in the lives of many children in today’s schools. These educators told stories that helped us to understand that much of what they felt they ought to be doing in schools was no longer in their hands. Increasingly, the work of these teachers, particularly, those serving poor immigrant children of color, was being managed and legislated beyond school doors.

This realization helped us to see that children were not the only ones whose freedoms were being thwarted in today's schools. The difficulties these educators expressed helped us to see that if educators are to help children realize their own sense of agency on their quest for greater freedom, choice, and well-being in their own lives, then these educators needed to do that, first, for themselves. Therefore, we saw value in using research processes that not only allowed educators to tell their stories but also engaged them in inquiry processes that provided a needed time and space to reflect upon those experiences through shared dialogical processes. Freedom can only be achieved in a context of a community that enables us to see ourselves and our experiences in new ways, which can give rise to a greater consciousness of purpose and a stronger awareness of our own agency and what we are capable of doing.

The capability approach is rooted in a social, emotional, and relational approach for understanding human experience and enhancing well-being. This concern for the individual as *an embodied being* has relevance for the inquiry processes we use with participants in our studies. The reach for greater freedom always requires an individual and a social quest, which suggests a need for a participative approach to critical scholarship, engaging participants in processes as potential allies in social justice. Through a willingness to see social phenomena from multiple and competing perspectives, we become wide-awake to the social world we are creating, not only for others but for ourselves as well, and more consciously aware of the roles we are playing in increasing or diminishing real freedoms in the lives of others as well as in our own.

Through engaged inquiry processes and a close analysis of texts, documents, and policies driving what people do in institutions, researchers and project participants can collaboratively unpack the dominant discourses that are shaping teachers' and administrators' thinking. Through our own collaborative research projects, we found great value in combining Denzin's call for capturing in-depth personal narratives, specifically focusing on freedoms to achieve and child well-being, with Smith's concern for examining how people's work and lives are, increasingly, shaped by ruling relations (1990, 2005, 2009).

For Smith, ruling relations are visible in the official texts that structure and control what people recognize as "institutional knowledge." However, we came to realize that personal biography always plays a significant role in how participants make sense of and respond to institutional discourses. Through a collaborative approach to inquiry, researchers can work with project participants to consciously examine the discourses that are shaping work processes in the school and trace how these prevailing discourses are impacting the educational freedoms and opportunities of children and their families.

The value of this methodological fusion seemed particularly important given what was happening in New York City at the time. For example, when Mayor Bloomberg charged that low standards and social promotion were to blame for low achievement in NYC schools, he disseminated this message broadly and then, singly, pushed through an unpopular third grade retention policy by firing three of his appointees to the policy board, knowing that they were going to vote against mandatory retention. When people balked at the mayor's usurpation of the democratic process and the last minute firing of the board members, he retorted, "This is what mayoral control means."

Although the mayor has no background in education, he argued that setting higher standards would make both teachers and students work harder and that this would lead to greater academic achievement. Wells (2004) followed the chain of action set in motion by the mayor's press conference, and she began tracing the policy and documents that the press conferences generated and then followed these documents to see how they shaped and coordinated the work of the principal and, then, how the principal's responses to these documents shaped teacher's work with children who were directly affected by the policy. By linking what was said at a high powered press conference to written policy documents and by seeing how these documents shaped what happened at the local level, Wells brought people who would never meet (the mayor, the principal, the teachers, and children who failed their third grade tests) together into social relationships connected through institutional documents; such linkages between those who design policy and those who implement it are seldom traced and too rarely held up for purposes of accountability, top-down but also bottom-up accountability.

Wells' study captured personal narratives with children, teachers, and administrators, examining how teaching and learning was being shaped by a persistent discourse of "work harder" and "no excuses." Her study revealed how badly this policy played out at the school level. Wells found that the teachers were forced into retaining children, who in their professional judgment should not be retained. The teachers also felt that the mayor was disrespecting their professional judgment by making the test the only thing that mattered in the promotion decision. They expressed feeling silenced and handcuffed by a high-stakes testing process that they saw as educationally unsound and harmful to children, particularly to immigrant and other ELL students who did not speak sufficient English to be tested in the language. Further, the teachers noted that although some children failed the tests, they actually performed very well in class, producing classroom papers and assignments that showed that their abilities matched and even exceeded the classroom performance of other children who had passed the assessments but performed poorly in class. The teachers did their best to advocate for students like Marcus, who performed well in class but who froze on his timed tests for reasons that were more attributable to emotional upset during testing rather than to academic ability. Nevertheless, he was retained.

Marcus' freedoms to achieve were significantly diminished in this school, but it was not his teachers' actions that undermined his overall well-being. The capability approach directs the researcher's attention to both *freedom to achieve* and overall *child well-being,* and through this study, we learned that for Marcus, both were severely weakened. This was a tragic story with a very sad outcome for this little boy. He was no longer a happy child at school. He no longer liked school and "hates reading." Marcus was retained in third grade and, yet, again in fourth grade. Being retained once doubles a child's risk of dropping out of school, and children who repeat two grades have an 80–90 % chance of dropping out of school. The capability approach provides considerable insight into why children like Marcus are getting left behind in this achievement-focused era in education, reminding researchers and policymakers that if we hope to enhance the lives and life options of children, we must pay closer attention to their overall social, physical, and emotional well-being in our policy decisions and our everyday practices.

Conclusion

This chapter introduces readers to the capability approach to social justice in education. By placing this methodology alongside other critical methodological frameworks, I suggest that this approach to inquiry provides a powerful compatible framework for social justice researchers using other social, political, cultural, or economic methodologies in their work.

Sen, Nussbaum and Denzin's lenses are, particularly, helpful for capturing the experiences that impact achievement, freedom, opportunity, and choice in schools and in the communities they serve. More importantly, they provide social justice researchers and practitioners with a needed *human and humanizing* lens for understanding today's educational policy arena and for examining how the assumptions underpinning current utilitarian approaches to education are impacting school practices and the experiences and outcomes of many children.

Politicians, policymakers, educators, and social justice researchers all take positions on individual opportunity and freedom; however, the assumptions underpinning these positions are rarely examined sufficiently. At the heart of the debate that rarely occurs, there is a question: Are *all* children truly free to achieve, or is this just a story America tells itself to feel better about children and families who live at the marginalized edges of this nation?

In this chapter, my colleagues and I have seen that the most pressing obstacles to educational achievement and to the well-being of many children living in low-wealth communities are not academic only; Rather, many children's troubles in schools arise from a complex intermingling of social, emotional, and bodily needs that are not recognized or addressed by current educational policies or school reform strategies. Our disembodied view of academic achievement and our failure to recognize the broader needs of children have resulted in a "no excuses" approach to academic achievement and overly simplistic policies like mandatory retention, which ends up blaming children and shaming teachers and administrators for not producing desired results.

Sen and Nussbaum help us to see that a child's freedom to achieve is not simply a matter of will. Rather, children need adequate support to grow academically, socially, emotionally, and physically if they are to come into full being. The problem we have, particularly in the western world, is that we have come to believe our social science categories, assuming that we can isolate and focus on the academic child and ignore his or her social, physical, and emotional well-being. However, the stories we tell in this chapter challenge that belief.

The capability approach directs the researcher's attention to what children are able to be and do. It provides a methodological framework for putting the child at the center of inquiry and then rethinking the systems, policies, and processes used to increase educational opportunity based on the *real* needs of children and youth.

Some might argue that the capability framework is too broad and that the focus on child well-being is too inclusive of social problems that extend beyond the academic walls and concerns of schools. Nevertheless, the real problems that children face in their homes and communities do not disappear upon entering school door, and how policymakers and educators frame the problems they see results in policies and practices that have enormous power to either increase or diminish children's real freedoms to achieve.

The capability approach brings scholars who care about the needs of poor children around the world together. The Human Development and Capability Association and conference arose from a growing recognition of the need for cross-disciplinary examinations of social and educational problems and a call for a long overdue collaboration among researchers and practitioners across disciplines and work sites, focusing on the social, emotional, and academic well-being of children. This same need is being expressed in growing calls for a greater integration of social and educational services to meet the multiple and intricately interwoven needs of, particularly, poor and vulnerable immigrant children of color. The capability approach, then, is a path toward that end.

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Chapter 11
Narrative Inquiry (NI) as an Exemplary Method for Social Justice Leadership

Alexandre Ibongya-Ilungu Muzaliwa and Mary E. Gardiner

Introduction

Immigration and refugee issues are not unique to Idaho, USA, but a global phenomenon. A valuable approach to enhance one's self-knowledge to connect with immigrants and refugees and ultimately embrace a social justice perspective is through narrative inquiry (NI). While NI as a research method has a long tradition, educators in the USA have typically not been engaged in NI throughout their education. The method of NI offers the potential for transformation of the inquirer toward social justice. Social justice leaders are defined as agents who are called to initiate change in classrooms, school buildings, districts, and communities toward equity and inclusion. Social justice leadership addresses injustices in ways that are replicable by the students and communities in which educators live (Muzaliwa, 2011).

Social justice leaders share certain characteristics (Fraturra & Cappa, 2007). These characteristics include: (a) leaders who hold the core belief that all students should be educated in heterogeneous settings; (b) leaders who possess the knowledge and skills to put this belief into action; (c) leaders who are able to imagine schools where all students belong and are not segregated to have their learning needs met; (d) leaders who are able to see similarities among student differences; (e) leaders who advocate for students who struggle in school; (f) leaders who are not defensive about their limitations, honest about where they are in the process, and determined to push ahead; (g) leaders who are continually educating themselves about the areas of equity and diversity that they may lack knowledge in; and (h) leaders who are continuously developing and sustaining their ethical core so they are able to withstand the pressure to do otherwise.

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Narrative research came to us out of a passion for justice for students who were not mainstreamers, some of whom were native-born Americans outside the dominant structure, and some who had come from other countries regarded by western society as the "Third World." As naturally storied people, narration gave us, as researchers, a vehicle for studying a phenomenon that other methodology or theory could not (Barone & Eisner, 1997; Clandinin, 2006). The narrative method is a continual "researching, a searching again, continual formulation of an inquiry" (Clandinin and Connelly, p. 124). While there is no guarantee the reader of the narrative will gain the perspective that is intended by the narrator (Atkinson, 2010), NI offers the potential for growth toward social justice leadership as illustrated in this chapter.

The context for the inquiry, an urban school district in Idaho, has witnessed growth in the immigration of people from sub-Saharan Africa, Middle East, Central Asia, Central Europe, Mexico, and Latin America. The children of these immigrants and refugees have backgrounds different from those of their predominantly white educators. The social injustice addressed in this study was the isolation and marginalization of diverse students in predominantly white schools and the need for their educators to grow in self-knowledge, understanding, and connection with their students and families. School districts in Idaho have a history of a perceived lack of diversity and racism associated with white privilege. The Aryan Nations, a white supremacist group, had a foothold in Idaho until 2000, and vestiges of racism remain. Some of our most promising students in Idaho experience racism on entering their schools (see Anderson, 2006; Canfield-Davis, Gardiner, & Joki, 2009; Hondo, Gardiner, & Sapien, 2008; Idaho Statesman 2008, 2009, 2011; Vogt, 2003). Educator self-knowledge and interaction between educators and their "foreign" or "othered" students was a study of interest. The lead author was a refugee and the authors were immigrants to the USA; both families currently have African-American children in secondary schools. However, the second author was in a privileged position as a university faculty and the lead author a doctoral student; thus, our own research collaboration offered the opportunity for learning from each other. We were interested in the research question: What were educators' understandings of social justice, and how did they change through narrative? We interrogated educators' experiences and our own, seeking answers to this critical question.

Social justice means creating equitable schooling and education, focusing on groups that are most often underserved, underrepresented, and undereducated and that face various forms of oppression (Jean-Marie, 2008) and addressing and eliminating marginalization (Dantley and Tillman, 2010; Theoharis, 2007). Social justice leadership is thus concerned with antiracist and anti-oppressive education (Kumashiro, 2000). Earlier studies in Idaho investigated how a social justice leader engaged in transforming a community besieged by a hate group (Canfield-Davis, et al., 2009), how school principals engaged in multicultural leadership (Gardiner & Enomoto, 2006), and the tension for principals working with multicultural diversity issues in school systems concerned with testing and accountability (Gardiner, Canfield-Davis, & Anderson, 2009). This chapter argues for an additional point of view that the research method of narrative inquiry itself, not just the issues studied, is a means to advance social justice leadership.

Theoretical Framework

Narrative inquiry (NI) from a social justice perspective, specifically a Freirean-based theory, served as the framework for this study. The power of stories is to bring people of diverse origins together and unite them as they work toward a common goal. We followed Purpel's (1999) definition of social injustice. He refers to, "The horrors of poverty, disease, war, and bigotry whose origins and possibilities of resolution are basically human. The sufferings that emerge from human greed, hostility, and ignorance" (p. 11). Many people seem unable or unwilling to recognize the extent of injustice that exists, but social justice leadership could be a way forward. The intention of our forefathers to create a country based on equal rights for all has not proved to be achievable to date. The social and economic system is based on a power structure that promotes competition and perpetuates greed, hostility, and animosity (Freire, 2005; Giroux, 2010; Hooks, 2003). Not all segments of the population in this country in particular, and in the world in general, have equal access to status, rights, and resources (Banks, 2010; Darling-Hammond, 2009, 2010; Delpit, 2008). Some school children in this country and elsewhere in this world are subjected to injustice for a variety of reasons including economic status, skin color, ability, gender, sexual orientation, ethnicity, and religion (Cochran-Smith, 2004). Although poverty is just one of the many manifestations of injustice, it is insidious because poverty is not easily rectified. All poverty is unjust. Where there is abundance, but some go hungry, there is injustice (Gollnick & Chinn, 2002). Leadership for social justice from a Freirean perspective means radical social change and advocacy for people from a standpoint of reconceptualized dialectical and horizontal relationships rooted in "humility, faith, hope, critical thinking, and solidarity" (Miller, Brown, & Hopson, 2011, p. 1090).

Narrative Inquiry for Social Justice Leadership

Narrative inquiry is a self-reflective process, which builds on the professional experience of the researcher (Chan, 2006). NI was used to research educators' experience with diverse students and how they came to understand social justice. The meanings created by the participants were part of a process of inquiry where participant stories were interpreted by the researchers but left intact as much as possible to enhance research rigor (Bullough & Pinnegar, 2001; Feldman, 2003).

The connection between social justice and narrative has been well established as a teaching strategy in the literature (see Marshall & Oliva, 2010; Nieto & Bode, 2008; Noguera, 2010). However, only recently has narrative research begun to emerge as a *research method* that advances *social justice* (Brooks, 2008; Muzaliwa, 2011; Phillion, 2006). In other words, the *process* of the research has the potential to transform not only the participants in the study but also the researchers themselves. While there are no guarantees that readers will interpret the stories with the intended message (Atkinson, 2010), participants who engage in NI can transform themselves. Participants can then influence their communities through teaching, colleagueship, and community engagement toward social justice.

Procedures for data collection in the narrative inquiry involved two semi-structured interviews of approximately 45–60 min in length conducted with each of the three participants. Interviews were digitally recorded and transcribed. All transcripts and notes taken during interviews and class observations were member-checked with participants. Data included the semi-structured interviews, nonparticipant observation, and collection of documents, such as curriculum and reflective memos. Analysis of data was ongoing and began with the transcription of interviews and the digitalization of observation field notes. Interim texts were then written which were descriptions or stories not intended necessarily for the public but which served as a bridge to the final product. Final products were research texts or stories of experience such as the one presented in this chapter of Patricia, the educator, which has embedded within it, Yahya's story. Readers can discuss, share, and ideally learn and develop empathy from the stories in order to lead for social justice. What the research does in the process of studying a particular phenomenon is shift from living stories with participants to actually retelling those stories in a manner that makes a contribution to the world by critically answering the questions: "So what?" "Who cares?" Because all texts are *plurivocal* (Rabinow & Sullivan, 1987, p. 12) and subject to different interpretation by different readers as well as by the same reader under different circumstances, it was crucial that through the analytic process the discourse did not get fragmented. For details on the design and procedures of the dissertation study, see Muzaliwa (2011).

Narrative inquiry (NI) brings full meaning to an experience, enhancing the understanding of an event. The narrative process as described in the story of Patricia in this chapter is not simply the recollection of events as they happened. Narrative as a self-reflective process synthesized emotions, values, feelings, ideals, physical, and bodily demonstrations that made the process meaningful and the experience worthwhile (Clark & Keefe, 2002; Ellis, 2002). NI was an evocative act exploring the innermost corner of our souls in search of how an experience affected and changed us. We ask what is the value to you, the reader, of Patricia's story, Yahya's story? Our stories?

The Idaho Setting Where Narrative Inquiry Was Transformative

Even today, with 89.1 % of its population being white (United States Census Bureau 2010), Idaho unfortunately has the image of being one of the most non-diverse states in the nation (see Vogt, 2003; Newart, 1999). The setting for this study was secondary, public schools in an urban school district in Idaho. The district housed 50 public schools in grades K to 12, with a total of approximately 30,000 students and 2,000 teachers. In the USA, Idaho is situated in the northwestern part of the country in the Rocky Mountains. Idaho state's population of 1,545,801 (United

States Census Bureau, 2010) is mostly white 89.1%. The main issue the state has faced is redefining itself as a welcoming and diverse state.

The context of a history of racism associated with the state bolsters our efforts to chart a new direction. According to Canfield-Davis, et al. (2009), between 1983 and 2000, the Aryan Nations "had tarnished the image of a community, tried to intimidate many, and committed over 100 crimes from 1983 to 2000. Ultimately, the Aryan Nations was named as a defendant in the case Keenan v. Aryan Nations (District Court of the First Judicial District, Idaho, Kootenai County [CV-99-441]). In 2000, the jury returned a $6.2 million judgment against Richard Butler and the Aryan Nations. In order to avoid paying the full damages, Butler declared bankruptcy. His property was confiscated by the federal court and awarded to the Keenans (family who had been the victim of a hate crime). Today, it is used as a public peace park." Several examples of the remnants of racism in Idaho can be found reported in the newspaper, *The Idaho Statesman*. On Wednesday, November 19, 2008, the Idaho Statesman reported second and third graders on a Madison School District bus in Eastern Idaho chanted "Assassinate Obama," and the school district spokesperson brushed aside concerns stating that "the children didn't understand what they were saying" (p. 18). On Sunday, April 19, 2009, the Idaho Statesman reported that "a leader for the white supremacist group" said that President Obama was the "greatest recruiting tool ever" (p. A10), and the Aryan Nations group was once again recruiting members in Idaho. In nearby, Spokane, Washington, January 2011, on the MLK Day march, a bomb was left on a seating bench en route for parade marchers; the bomb had the potential to kill or maim dozens of people (Idaho Statesman, 2011). Within this context of efforts for human rights and social justice in Idaho, two high schools and one middle school were chosen for the project utilizing NI.

Educators Who Were Transformed Through Narrative Inquiry (NI)

The educators in the study, using pseudonyms to provide for confidentiality, were:

Patricia White (A high school) – This high school teacher was a white female from a European background in her 50s, who had been teaching for over twenty-five years. Her socioeconomic family background was upper middle class. She was teaching tenth, eleventh, and twelfth grades.

Alvarez Fernando (B high school) – This 40-year-old teacher was seen by others as Hispanic/Latino, but self-described himself as a white male with a Puerto Rican background. He had been teaching for more than ten years. Alvarez's teaching was enriched by a poverty background in Puerto Rico, which gave him empathy for low-income students and families. He was teaching ninth, tenth, eleventh, and twelfth grades.

Amanda Brooks (C middle school) – This sixth, seventh, and eighth grade teacher was a female teacher of mixed heritage (Native American and European/Romanian heritage) in her 30s who had been teaching for more than seven years. Amanda's family background was self-described as middle class.

The researcher's themselves gained self-knowledge and through interaction, reflexivity, and engagement with each other and developed an increased empathy for students in our schools and a renewed vision for social justice leadership in the state which includes NI.

Alexandre (Ilungu). Having seen the prevalence of injustice in the system of education in the Democratic Republic of the Congo, DRC, Kenya, and today in the USA, I felt the necessity and importance of social justice in the educational system. Relocated as a refugee from my home country DRC to Nampa, Idaho, USA, a number of incidents took place in my new country that led me to look to narrative. In 1998, I traveled to Chicago for a friend's wedding. I still have the vivid memory of how people, both black and white, were wondering how could I, a black person, be living in such a state where the gospel of hate was being preached!

When we arrived from Africa, my family and I were sponsored by the First Presbyterian Church in Nampa, Idaho. Refugees as we were, we had no means of transportation. It needs to be noted here that the town of Nampa to this day does not have public transportation. According to policy for new refugees, I was volunteering at the Nampa public library while receiving food stamps. The city of Nampa made arrangement with the Nampa School District for the driver of the Head Start bus to pick me up for the library volunteer work every morning and take me back home every evening. The driver did that for one week then refused to give me the ride. He stated that the reason was that I was black, and he didn't want a black to be riding in his bus.

On another occasion, one of my sponsors came to visit us at home during a beautiful summer evening. We took a walk outside to see the neighborhood. Our sponsor, who was also a Pastor, introduced me to one of my neighbors who was standing in his driveway. The sponsor introduced me to him saying, "This is Mr. Muzaliwa who just arrived from Africa as a refugee; he and his family are living two houses down the road." The person replied, "What did he come to do here? He should have stayed in Africa; we don't need them here."

Around the same period, one of our daughters had a white friend from school who happened to be the daughter of one of our neighbors. Their house was across the street of ours. They were of the same age. They were daily playing together and visiting each other. But one day the girl told my daughter that she could no longer continue to play with her, and that her mom didn't want her in their house because she was a "stinky black." The mother didn't appreciate a friendship between her daughter and a black girl. That was the sad end of their friendship.

My own experiences have left me with a painful awareness of the extent of injustice. It has been told over and over in this country, especially to children in schools and to newcomers, that if you work hard enough, anyone can be successful, but it is not true. For many children, the obstacles are too great to overcome. Many speak of injustice, but how many are willing to dedicate their lives to ending injustice?

Mary. My African-American son attending Idaho schools for over a decade makes my passion for social justice personal. From a mother's love came my urgent commitment to educating myself and others on ways to work together to enhance student enjoyment of school and school success. I have felt my son's struggle in school and know it is not right. Why is school perceived so differently by my two sons? Could it be the continued lack of narratives of diversity in the school, not to mention lack of diverse faculty? For years I have worked with immigrant and African-American students, such as Ilungu, and have also felt their struggles as they try to acculturate into a predominantly white university culture, yet also retain their own cultures. I have learned through narrative I can begin from a position that I know very little in the area of social justice, but through my parenting, teaching, and friendships listen better and learn. Narrative inquiry offered a vehicle to connect with Ilungu and hear his stories and those of the educators' and perhaps even their students' stories, providing a vehicle for my own struggles and stories as a single parent raising teen boys.

From this perspective of social justice, we explored educators' experiences, inquiring how they perceived the role diversity played in their lives and work as educators. It was not the purpose of this research to attempt to discover a theory of, or solution to, the problem of injustice, but rather to come to a greater understanding of how NI as a traditional qualitative research tool may be drawn upon in a new way for social justice. We used personal experience as the foundation for the research, drawing upon the experience of the educators in the study and our own. The findings can be seen as a mosaic of experiences. We report here one educator's story, that of Patricia, as told to Alexandre (Ilungu).

The Central Narrative: Patricia's Story

I am a teacher and a parent, an educated woman descended from white settlers, living in a wealthy country. I have taught in elementary school, middle school, and secondary school. When I began graduate studies, I was a middle-year language arts teacher. There are some things that all these students have in common. They are keenly aware of fairness and unfairness and seem to watch for slight injustices as they see them committed by their administrators and teachers.

The small town I was raised in was populated entirely by white Christian people. There were no reserves nearby; we knew very little about Native American people. The only time we saw "Indians" was when we were in the mall in Sioux Falls, South Dakota. I remember my friend's mom telling us to stay away from "those girls" because they belonged to gangs. This was during my adolescence. I did not know any different and I stayed away from Native American people until I moved away from home. Then, I was not really surprised to find out that none of the Native American people belonged to gangs. Now I know that they are not scary people, just people who (like me) are part of a community of friends and family.

Our white community was run by the cooperation of its members. The people within looked after each other and did not have much to do with those outside of their town and their families, especially if they were of a different color, "the others." Now, we need to be more aware of our global community. We are the rich neighbors who need to do our part.

My father is the first-generation American. His father was born in Romania. It was very important to my grandpa that his descendents speak English and get an education. My grandparents on both sides were rural people who worked hard for everything they had. They wanted their children and their children's children to be educated so that their lives would be easier. I was raised with the idea that my most important job was to get an education.

As a new parent, I want to make sure that my own children are aware of the wider world. I want them to be generous in their lives and to share with those who have less than they do. We have so much that we may not be aware of how much we have. We live in a community of wealth and that gives us the opportunity and the obligation to help others.

My history, my experiences, and my current situation as a parent and teacher, all lead me to want to make social justice a more prominent focus in my work as an educator. How do we teach children about those who live in poverty and live in unsafe circumstances and help young people find ways to help those in need? When I reflect on my chosen work, I see ways that I can improve my own teaching methods. The people I have met and the reading I have done have changed some of my beliefs about my own teaching.

Reading on the topic of critical theory and particularly critical literacy (in the course on multicultural diversity) has helped me to realize I was showing students examples of injustice, but I was not engaging them in asking the hard questions. With my whitish-made mind, I was not taking them to the root cause of the injustice so that we could contribute to transformation. This is important work in our world.

I was appalled by the story of one of my students in our high school, a few years ago. She was in eleventh grade; her name is Yahya. Yahya was an expressive young Kenyan who arrived in the USA in 2002. Her school experiences were colored by an event that took place during her first classes in high school in the USA. In her history class, she recalled that the teacher asked everyone to introduce himself/herself, telling the class about the family background and future goals. She remembers that she was the only African student in class that day. When it was her turn, she introduced herself as a native of Kenya, Africa, and as someone who was interested in receiving as much education as possible. She explained that she believed in diversity and the importance of learning from other cultures about things she might not be familiar with. She said her uncle, in Africa, was a university science professor, and that she was looking forward to graduating with a higher degree in science and serving as an astronaut.

"I remember that when I mentioned the name *Africa*, she explained, there was a little giggling and laughing among the students. But I did not know the implications of that kind of response at that time." When she finished introducing herself, some of the other students immediately began asking her about animals in her village. They asked if she talked to giraffes and antelopes in a certain language and how she was able to fend off attacks from lions, leopards, hyenas, and chimpanzees. They asked her if she grew up wearing no clothes and shoes, and if she ever saw cars and computers before she arrived in America. She could not determine whether their questions were sincere efforts to learn about her African environment or just derogatory remarks on what they might have watched on television.

Yahya said she was embarrassed that she did not know which questions to answer first. When she began answering the questions, some of the students continued laughing as if they were dismissing her honest responses. "I don't mind answering any questions, but there were two things that made me angry. First, they were not interested in my answers. That tells me that the questions were meant to mock me and my background." She confessed that she subsequently decided not to give any more answers since no one was listening. "Second," she continued, "I realized that no one seemed to pay attention to the content of my introduction; that is, everything I said about my educated uncle and my own educational dreams of being an astronaut." She was, therefore, offended that the most important thing they wanted to talk about in relation to her was animals, clothing, and her perceived lack of access to modern technology.

During my interview with Yahya, she reiterated that she was not worried about the condescending questions from her classmates. Her main disappointment was the inability of the teacher to intervene while she was being belittled as a person from the jungle. She expected the teacher to call the students to order and redirect their attention to the contents of her introduction. Instead, the teacher stood by as they derided her African heritage, her native land, and her culture. "Don't you expect the teacher to, at least, remind the students to respect other people's cultures, even if they disagreed with them?" she queried rhetorically.

"The funny part of the whole thing," Yahya explained, "was that I was born and brought up in an African city and never saw animals except when I visited the zoos with some family members and friends. That is no different from the experience of a regular American kid here." She felt that her peers were not looking for an honest answer, but for information to support their preconceived and biased views about Africa. Since she was unable to provide the kind of juicy answers they were expecting about cohabiting with animals, she felt she consequently got a rude and dismissive response from her classmates. Patricia said for herself as an educator in the public schools, knowing Yahya and hearing her story prompted her to become more active to leading and teaching for social justice. Many students tend to focus on their own problems. I want to help my students to recognize the problems of other people. It is important to provide them with an opportunity to consider unfairness and social justice beyond their own situations (Freire, 1970). I want to give students a positive forum through which they can identify and understand injustice and then choose how to act on the injustice. Yahya's story as generated through Patricia's narrative made Patricia better understand as an educator that she had the responsibility to lead and teach for social justice, starting in her own classroom. Social justice was no longer an abstract concept, but became a living narrative and influence, which energized her to teach and lead for social justice.

Implications of Narrative Inquiry Research Method for Social Justice Leadership

My own story (Ilungu) as a refugee who came to Idaho only to find not all people embraced my story, even if they knew nothing of it, can also provide a mirror for the reader to reflect on their own story. In Patricia's story and our own, we see that narrative is no longer a methodology that uses the distant observer and the observed. Narrative became a quest for understanding personal experiences as researchers, observers, and protagonists.

Administrators, teachers, and students must inquire within about their own educational and life experiences, and their voices be heard and given legitimate recognition. Narrative has the potential to transform the perspective of individuals and influence schools. The researcher becomes aware of the transcendental effects of one's actions. It means understanding what we have lived and how that lived story shapes our lives (Clandinin, 2006). The path to greater understanding and leadership for social justice is through self-discovery of an educator's own self-knowledge to improve the nature and specifics of their work. The administrator or teacher must become an active participant in changing and transforming their classrooms and schools. One path toward self-knowledge or self-discovery involves the use of NI. Narratives, in this context, are messages developed by the author to tell the particulars of an act or occurrence in someone's life. Narrative allows the examination of one's life in social context. It proposes the opportunity to explore a person's meaning about himself/herself in the world. As narratives of individuals are shared, the barriers disappear. Students and educators alike develop an understanding of one another.

It was necessary in Patricia's narrative to consider the cultural experiences of underrepresented groups. Students' perceptions of success and opportunities in the society determine their reactions. Carter believes that some culturally diverse students (in terms of socioeconomic status, culture, language, gender, race, religion) may react in oppositional ways to education, to distance themselves from who they are and their home cultures in order to succeed. Immigrant and refugee students operating under this frame of reference will often give up their home language, culture, ethnic values, and other identifying ways of life. Other disenfranchised students may instead practice resistance to assimilate the dominant group's culture and practice disengagement as a form of resistance or cultural inversion (Ogbu, 2003). African-American students can develop defensive mechanisms by choosing cultural behaviors that differentiate them from the majority to combat the perceived attacks on their language and culture (Carter, 2007; Nieto, 2000; Ogbu, 2003). These students may feel that acting white and the adoption of mainstream culture are also not a guarantee to success and not only will they still be unsuccessful due to racism in the dominant culture, but it only serves to alienate them from their own cultures (Chavez-Chavez, 1999). Yahya's experiences awakened in her teacher Patricia the sense of outrage and commitment necessary to fuel change in ourselves and our classrooms. Through the student's story and her own, Patricia came to new understandings of privilege, power, and oppression.

These considerations matter. Postman (1995) asserted that educators have a duty to help create a sense of purpose for students. This is the reason why administrators and teachers must be attuned to students who have not traditionally been well served by public schools and also specifically immigrant and refugee students. Public schools purpose, Postman argues, is to create new worlds for their children to grow in, to build intelligence, to create beauty, to guide their passions on the hopes of the future, to inspire in others the sense of purpose, and to change that which many found impossible. Educators must assist students to find their purpose within the walls of education using cultural and ethnic narratives. From a Freirean perspective this means centering love, hope, and trust in the community (Miller, et al., 2011) so that educators, students, and their families know and trust each other. Narrative can help in examination and analysis of who we are, where we are, where we came from, and where we are headed. Narrative is about connecting voices (Ellis, 2002). The voices help educators understand themselves, connecting their work to the rest of their lives (Ellis).

In our global village, social justice leaders must be engaged in "transformative leadership" (Shields, 2003) by, first, developing a heightened and critical awareness of oppression, exclusion, and marginalization (Brooks & Miles, 2008); that is, they must recognize and understand how institutional power arrangements and practices favor some groups to the detriment of others. Social justice leaders must work for substantive change in their schools. Leaders for social justice resist, dissent, rebel, subvert, possess oppositional imaginations, and are committed to transforming oppressive and exploitative social relations in and out of schools (Brooks & Miles, 2008; Furman, 2012; Jean-Marie, 2008).

Howard (2007) describes a five-phase process socially just school leaders implement when creating inclusive and equitable schools, and we see a role for NI to enhance this process. The Howard process requires a firm commitment from educational leaders. In the first phase, leaders build trust by inspiring a climate of constructive collaboration among colleagues. In the second phase, school leaders promote professional development in cultural competence. Howard defines cultural competence as a clearly defined set of values and principles that support policies, practices, behaviors, attitudes, and structures that enable educators to work effectively across the cultures the students represent. In the third phase of creating inclusive and equitable schools, leaders confront social dominance and social justice. Howard states the central purpose of this phase is to inform, inspire, and sustain educators in their work without shame or blame. During this phase, schools develop an equity vision statement that guides all future reforms toward making a school more inclusive and equitable. The fourth phase transforms instructional practices. In the name of social justice, this phase transforms pedagogy and curriculum to develop culturally responsive teaching that forms authentic relationships with all students, honors each student's culture, meets diverse learning needs, communicates respect, and holds consistent and high expectations for all learners. Howard defines this step as crucial, because it is here that school leaders and other school professionals stop blaming students and their families for gaps in academic achievement. In the last phase, leaders engage the entire school community, meaning all stakeholders. All have a powerful role in setting an inclusive climate for students and parents. We believe narrative inquiry (NI) in higher education and public schools has a role in each of these stages because not every educator begins their work from a position of being or becoming a social justice leader, but all have the potential to become social justice advocates through story and friendships that can be created through NI.

To engage in dialogue through NI is one of the simplest ways to begin as scholars to cross boundaries and make connections (Hooks, 1994). As we began to transform ourselves through the reconstruction of our stories, narrative method taught us the purpose of writing is not a technical one, but rather a social justice one (Adams & Kirova, 2006; Cai, 2005; Cochran-Smith, 2004, 2009; Moraga & Anzaldua, 2002). Narrative inquiry gave us a vehicle for studying ourselves and the phenomenon and invigorated social justice leadership.

Conclusion

Narrative inquiry allowed the researcher and participants to come to better understand themselves, and the other, through emotions, ethics, context, and concern for self and others. Educators changed their perspective after becoming more sensitized to issues of "othering" inclusion/exclusion and privilege/oppression. Educator participation in the narrative research project provided them with the opportunity for self-inquiry and self-reflection around specific issues targeted by the research problem of social injustice in schools. The research was able to draw attention to educators' own narratives as a way to enhance understanding of themselves and others to produce a view of who you are in me and I am in you. Increased attention given to social justice, whether in specific diversity and social justice courses, in core courses, or in internship and service learning experiences, brings to fore a focus on the moral purposes of leadership in schools and how to achieve these purposes (Furman, 2012). As Evans (2007) observed, educational leaders have a social and moral obligation to foster equitable school practices, processes, and outcomes for learners of different racial, socioeconomic, gender, cultural, disability, and sexual orientations backgrounds (p. 250).

Our view supports Purpel (1999) who spoke with passion and moral outrage over social injustice: "We must come to see social justice [leadership] as more like a conflagration than a fire, more like a world war than a skirmish, more like an issue of cultural survival than one of social adaptation" (p. 14). Narrative appears to be a critical method in the struggle for social justice. Greene (1998) stated, "A general inability to conceive a better order of things can give rise to a resignation that paralyzes and prevents people from acting to bring about change. To call for reflective capacity is to work for the ability to look at things as if they could be otherwise. Doing so, a person may become freed to glimpse what might be; to form notions of what should be and what is not yet" (p. 19).

Recognition that the role of school leaders is at least in part to advocate on behalf of traditionally marginalized and poorly served students carries a corollary contention that traditional power structures must be deconstructed and reconfigured (Allen, 2006; Lugg and Shoho, 2006; Scheurich and Skrla, 2003). The political work of principals for social justice leadership has been explored by Ryan (2010) who asserts that besides political acumen, principals need qualities such as courage, boldness, and care to assert social justice agendas. We argue in this chapter an underexplored and vital tool in the fight for social justice is the power of NI as a research method and a means to provide for inclusion and equity. School leaders must increase their awareness of various explicit and implicit forms of oppression, develop intent to subvert the dominant paradigm, and act as a committed advocate for educational change that makes a meaningful and positive change in the education and lives of traditionally oppressed students (Allen, 2006; Freire, 1970, Fullan, 2010). Researchers and participants alike can do all these things through self-discovery in narratives of themselves and others. If educational leaders "can sufficiently increase their stock of courage, intelligence, and vision, they might become a social force of some magnitude" (Counts, 1978, p. 29) and extend their scope of influence. School leaders are potentially the architects and builders of a society wherein traditionally disadvantaged people have the same opportunities and, by extension social opportunities, as traditionally advantaged people (Fullan, 2009).

What makes NI an exemplary method for social justice leadership? First, *self-knowledge* can be gained through storytelling which allows us to explore who we are, where we've come from, and where we're going. By connecting with our own struggles and fears, we might better be able to stand in another's shoes and reclaim our humanity through connection with others. Second, *universality* of stories makes NI a vehicle for connecting across cultures. Everyone has stories and experience that can be a replicable tool for leveraging efforts in social justice in any school or community. Third, implementation is *cost-effective* and requires little more than a commitment to change on the part of the educator integrating NI into existing curricula or programs.

We employed a traditional research method but invigorated it with social justice sensibilities, including self-knowledge and reflective dialogue and commitment to improving students' conditions and strengthening school culture and community. By telling stories and listening to her student's story, Patricia came to discover herself, just as we also understood ourselves in a deeper and more critical manner. Applying theory to practice, by situating learning in an experience, educators can draw from the strengths and weaknesses of students to create a positive community for learning. Educators who are social justice leaders must challenge the status quo in research of a dominance of quantitative methods. Researchers for social justice leadership can begin by breaking the rule of quantitative research being the "gold standard" and insisting on funding and support for the methodology of NI. The power of stories for social justice is to bring people of diverse origins together and unite them as they work toward a common goal. Narrative has a critical and emergent role, as a vehicle for social justice leadership.

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Chapter 12
A Bricolage of Voices: Lessons Learned from Feminist Analyses in Educational Leadership

Whitney Sherman-Newcomb

I entered the educational leadership professoriate in 2002 as a feminist scholar who pointedly chose to make gender a "useful category of analysis" (Scott, 1987) in her mission to serve the field as a social justice researcher and teacher. I made this choice to be a feminist scholar and to engage in feminist teaching and research fully informed (*thanks to a great mentor because it always eases the blow of disappointment to know what your obstacles are going to be up front*) and with eyes wide open of the knowledge that the path I chose may be difficult; awards and grants might be scant or absent for research on women (*they were and still are*), reviews of my writing and research might be unfavorable (*some were…the most biting was the review I received stating my use of feminist poststructuralism was like a jelly and ketchup sandwich and the most ridiculous was when I was asked to change my feminist interpretation of a set of data to a human resource framework because of editorial discomfort with a feminist analysis*), and many might question the validity of studying women (*some did and still do*). Regardless, I entered this world of creating a purposeful presence of social justice in educational leadership at my own risk and, honestly, never looked back. The purpose of this chapter is to illustrate the lessons I learned from a decade of studying women in or aspiring to educational leadership positions and to determine whether gender has actually been a useful category of analysis. Have I learned my lessons well? How have I, personally, come to consciousness as a researcher? What story do the varying images and counter narratives of women educational leaders collectively tell? And how can I best express this story?

In art, collage is a technique of pasting materials together, a type of makeshift handiwork, that changes the nature of a creation as a whole. According to Stern (2008), collages have been used for centuries to "enhance the texture of their

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offerings" and have strong connections to other art forms that attempt to transform two-dimensional forms into three dimensions. In literature, collage, often referred to as bricolage, is a piece of work created from diverse sources and is the use of words as an artistic form of expression. Bricolage offers readers an assemblage of forms, or stories, that create a new whole. The weaving of stories together also facilitates a connection between the viewer (reader) and creator (writer). According to Denzin and Lincoln (1994), a researcher who brings together multiple perspectives is, herself, a bricoleur or quiltmaker (Denzin & Lincoln, 2000) as she pieces together a body of perspectives that, together, help readers understand a complex problem that cannot be explained by one of the perspectives alone (p. 4). Hence, bricolage, because of its very nature, allowed me the creative freedom to piece together what follows as a type of literary art that has both practical and political significance.

Further, because this bricolage is also autobiographical in nature, as I discuss my own work and experiences as a feminist researcher, it allowed me to critically perceive the world in which I have immersed myself in the past decade and, thus, come to see this piece as a reality in process (Freire, 1993). According to Ellis and Bochner (2000), autoethnography is an autobiographical genre of writing that makes the experiences of the researchers "a topic of investigation in its own right" (p. 733) and that "displays multiple layers of consciousness, connecting the personal to the cultural" (p. 739). It places the self within a social context, for the purposes of this chapter, feminist research in educational leadership, and allows the self (me) or selves (the participants of multiple studies) to serve as the vantage point (Cole & Knowles, 2001). Autoethnographers "ask their readers to feel the truth of their stories and to become coparticipants, engaging the storyline morally, emotionally, aesthetically, and intellectually" (p. 745). This chapter is a collection of the findings (stories, perspectives, voices) of the studies of women I have engaged in over a decade and is my attempt to transform them into a piece of art that is multidimensional, an autoethnographical bricolage, and that moves beyond perspectives from different studies in isolation to reflecting upon them as a whole and considering what significance they hold together. Uniquely, the readers themselves can also become part of the bricolage as they construct their own meaning-making of the content, much as art aficionados do when observing and discussing paintings and sculptures.

The Foundation upon Which the Pieces Were Laid

The foundation upon which an artist creates a masterpiece holds vital importance as it sets the tone for all that can imaginatively follow. Research that addresses biases experienced by women in educational leadership (or who wish to advance in educational leadership) (Bjork, 2000; Blount, 1998; Chase & Bell, 1994; Grogan, 2000; Shakeshaft, 1989; Skrla, Reyes, & Scheurich, 2000; Young & Skrla, 2003) framed my work for the past 10 years and, in essence, this bricolage. According to Tallerico and Blount (2004),

> These factors [biases] include ideologies about appropriate sex roles, social stereotypes about who looks and acts like a leader, the socialization of children consistent with such stereotypes and norms, the bureaucratization of schooling that was built on separate spheres for women (teaching) and men (leadership), the conceptualization of schooling and its leadership in ways that emphasize competition and authority (stereotypically masculine strengths) rather than collaboration and service, administrative employment practices that present higher barriers for women than for men, and the greater proportion of men than women earning graduate degrees in educational administration up until the mid-1980's. (p. 640)

While affirmative action policies (programs that seek to redress past discrimination) in the United States have spurred advances in career opportunities for women, gender conflicts have remained static for the principalship due to the expectations that women should perform to male standards of leadership while also continuing to be responsible for duties at home. Askari, Liss, Erchull, Staebell and Axelson (2010) explored young adults' (single men and women ages 18–41) expectations about future household and childcare chores and division of labor. Though both women and men reported egalitarian relationships to be ideal, their expectations of reality were more skewed and, in fact, gender imbalanced. Women reported believing that though they wanted to do fewer household and childcare chores than previous cohorts of women, they would ultimately end up being responsible for more chores than they wanted to do. Furthermore, Orrange (2002) found in a similar study that though men report wanting wives who are career oriented, they expect them to sacrifice their careers for children if needed. Simply put, women's increased entrance into the workforce (and, specifically, school leadership positions) did not transform expectations of gender roles at home (Hochschild, 1989) because the root cause of gender discrimination has not been addressed (Schor, 1991); the problem has been merely patched.

Changes in hiring practices and policies are not enough if unspoken rules warn women not to utilize family policies that have been implemented to protect them and if women, once gaining positions, are still expected to adopt the same working patterns as men and continue to be forced to choose between having a family and leadership aspirations. Furthermore, as expectations for school and district leaders have increased, the number of hours required to perform the job has increased (Read, 2000), creating second (Hochschild, 1989) and third shifts for women who must find the time somewhere in the hours of a day to carry out the duties of a principal, wife, and mother simultaneously. This "gendered time" (Hantrais, 1993) often weeds women out of the leadership applicant pool. Women often deny their differences and live double and triple days by assimilating and multitasking to survive because they have less social power (Marshall, 1993).

While many reasons exist in the form of both internal and external barriers for the lack of women in top leadership positions, I have spent much of the past decade trying to gain a deeper understanding of these factors and how they impact women in both similar and contrasting ways. Mentoring has been of particular interest to me as it seems that the act has potential for moving women forward in the field if studied and implemented in purposive ways that advance equity. Readers will note themes related to mentoring emerged often from the data I collected. Readers will also note that I consciously chose to promote a collaborative approach to the scholarship I engaged in as my own way of "activating" feminism. The majority of works featured in this bricolage were co-constructed with other women. This choice was deliberate and the method I enacted to "pay it forward" to women was new to the field of educational leadership. Some of the projects were conducted with my own doctoral students, some were conducted with doctoral students across the country that I was asked to formally mentor, some were conducted with colleagues new to the field and who struggled to create research agendas and records of scholarship, and some were conducted with colleagues who were positioned to challenge me in my own growth as a scholar. In essence, this bricolage was formed from a network of methodological mentoring.

The intersectionality that young women and women from ethnic backgrounds experience has also been a source of inspiration for me as the literature on women's experiences from multiple backgrounds is more sparse than literature on women in general (White, middle-class women). My intent has been to add to the body of literature on women leaders with the specific purpose of providing as much new information as possible to move the field forward by questioning the processes and socialization embedded in the preparation of leaders and leadership practice and by giving voice to many who have been unheard.

The Laying of the Bricolage

As I considered how best to lay the pieces of the bricolage of the feminist analyses I have engaged in over the past decade, it seemed most natural to lay them piece by piece from the beginning of my career. I vacillated back and forth as I wondered whether it made most sense to lay them down in chronological order or by subtheme and finally decided that by providing readers with a chronological order of selected works, they would best see the development of my growing consciousness as a scholar. What follows is an accounting of these selected works. I begin the description of each body of work with a quote from a participant that represents a theme central to the findings.

The Bricolage

> I guess in a lot of ways it's [the reason I'm not perceived as a leader] because I'm a real soft person…Like my father, he was a natural leader. He was in the military and people followed and respected him without question. (Sherman, 2005, p. 729)

In 2001–2002, I conducted my first study of women in leadership as my dissertation research (see Sherman, 2005). As I dialogued with my dissertation chair about how I might make a contribution to the field, it became clear that while there had been a movement to understand the processes of informal mentoring in relationship to women in educational leadership, little was known about the processes of formal mentoring. Thus, I focused my study on women's experiences with a formal mentoring program; one that was district-based and couched as a "grow your own" leaders initiative. The proposed major advantages of formal mentoring programs at the time were that a greater number of aspiring administrators might be reached and the needs of a more diverse population of prospective administrators might be met (Fleming, 1991). Informal mentoring had come under scrutiny because of the reproductive element attached to the process (ritualized behaviors to protect and maintain a status quo) (Darwin, 2000) and its reported inaccessibility to women and minorities (Mertz, 2004; Smulyan, 2000) leading to the reduction of their chances of attaining principalships.

I conducted a survey of men and women's experiences with one district's formal aspiring leaders program and, based on survey responses, followed up to gain a greater understanding of women's meaning-making through interviews. Findings indicated that the program promoted the district's (superintendent's) view of leadership, which according to participants was more hierarchical than collaborative in nature as touted by the district and the leadership program itself; women participants were more comfortable imagining themselves in curriculum leadership roles because these roles did not conflict with "female-appropriate" roles; and women had not negotiated new discourses or paths to leadership positions. I wrote:

> The majority of participants spent numerous years in the classroom before ever considering moving into administration. These women had not conceived of alternative routes to administrative positions other than continuing to "play the game" and following the traditional path to leadership positions. They struggled to gain concrete experiences considered to give them credibility with those in powerful positions while also fulfilling their responsibilities as mothers, wives, and teachers, even with full awareness that men are not always required to follow the same path. (p. 727)

Furthermore, women participants felt that they had to take the initiative to ask for admittance into the program, while men were tapped automatically and asked to complete the program as an "afterthought" because many of them were already in leadership positions in the district.

One of the most interesting findings surrounded the notion of networking. Many of the women interview participants who had not gained leadership positions after participating in the aspiring leaders program did not understand that networking when aspiring to an educational leadership position involves establishing key connections and contacts with current leaders who hold positions of power in the district. The majority of the women, instead, conveyed the misconception that networking means getting along with and working collaboratively with their colleagues. They were unaware of the connection between networking and power (because the discourse available to them was limited based on prior experience or lack of experience with mentoring) and lacked the understanding that the act of mentoring can sometimes be equated with the gaining of power.

Applying a feminist poststructural (Davies, 1994; Lather, 1992; Weedon, 1997) analysis of the findings allowed me to understand that socially produced assumptions guided most women participants to believe that they were best suited for curriculum leadership positions because these types of positions did not conflict with the "nurturing" roles they had learned to accept and they could be "soft" leaders who were not expected to be "dictatorial" in nature. It was also apparent that a type of covert screening for the leadership program occurred as those people who were not informally mentored by current administrators in the district tended to be screened out of the process before they even began to think about participating in the program because they could not see themselves as true candidates for administrative positions in the first place and, thus, hesitated to participate in the program. According to Weedon (1997), common sense notions, or perceived "truths," such as the above (women are best suited to curriculum positions; leaders must be loud and militant), are constructed from social meanings that favor particular groups. This "fixed" wisdom in educational administration, based on the White male experience, left many of the women participants out as they questioned their fit in the aspiring leaders program, struggled to find leadership positions to no avail after participating in the program, and wondered whether they were suited to leadership positions in the first place while also being responsible for duties at home that were in conflict with commonsense notions of leadership.

> Male Principal
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> I saw opportunities opened and doors opened for me to step into leadership positions – and I mean doors [really] opened – and I was very blessed to have had the types of mentors that I've had and I've applied for certain positions and I was able to obtain those. Before I knew it, I was in this [principal] role. (Sherman, Clayton, Johnson, Skinner, & Wolfson, 2008, p. 67)
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> Female Principal
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> I applied 14 times to be an assistant principal and felt I wasn't being looked at fairly for this role. I continued to ask if there was anything more I could do to improve myself and my understanding of the position… (Sherman, Clayton et al., 2008, p. 67)

Despite the body of literature that placed the act of mentoring under scrutiny, many practitioners and researchers agree that the benefits (or potential benefits) of mentoring are significant (Browne-Ferrigno & Muth, 2004; Daresh, 2003, 2004; Ehrich, Hansford, & Tennent, 2004; Gardiner, Enomoto, & Grogan, 2000; Hubbard & Robinson, 1998; Mertz, 2004). And some have found that women leaders who identified mentors advanced to leadership positions more often than women who did not (Gardiner et al., 2000). Thus, the purpose of the next study I engaged in with several of my doctoral students at the time was to examine the experiences of both women and men principals across four different school districts related to their pathways to their leadership positions and to find out whether mentoring served as a critical brick on the leadership pathway for participants (see Sherman, Clayton et al., 2008). And, rather than focusing on formal mentoring alone, the focus for this study was on mentoring of any form.

Neither the men nor the women participants found participation in formal district-led mentoring programs to be helpful. In fact, both felt that participation in the program was more of an activity to check off a list of things they were supposed to do. In contrast, informal mentoring was described by both men and women as a significant step on the path to the principalship. Every male interviewed identified that he had been encouraged by a mentor (usually a supervisor) to begin a path into administration. Mentoring, for the males, was unsolicited. However, women principals did not report any form of encouragement by supervisors that was unsolicited. Each described having to approach a supervisor to express an interest in future leadership positions. Throughout the interviews, women used language that indicated a frustration with the status quo and an unspoken requirement for assertiveness in obtaining leadership opportunities. This frustration spanned across the act of seeking a principalship to their tenure as principals. Men, however, chose words like "blessed," "opportunities," and "open doors" when they described their pathways to leadership roles. This contrast in discourse indicates that mentoring worked to the advantage of men participants and the overall lack of mentoring had caused a broken pathway to the principalship for women.

> If there is a crisis, I know I have had more than a few…what's really good, we call each other. Everybody kind of like, fixes it. And it's really cool because we might have all different kinds of perspectives and then we talk about it, collaborate, come up with solutions, and then we do it. All of us…it's not just…nobody feels like their own island…which, I really like. (Sherman & Crum, 2008, p. 115)

Some studies have shown that women hold more leadership positions in organizations led by other women (Chen & Addi, as cited in Addi-Raccah, 2006), that women who have advanced to leadership roles are more likely to have worked for women principals in their tenures as teachers (Riehl & Byrd, 1997), and that women empower other women (Lee, Smith, & Cioci, 1993). Continuing to understand the strengths and the shortcomings of mentoring and to make sense of how mentoring (or the lack of) impacts women leaders, a colleague of mine and I studied the empowerment of women leaders by analyzing focus group conversations of the women leaders of a district that had a large number of women serving in leadership positions at the time (see Sherman & Crum, 2008). These women, of multiple ethnic backgrounds, served in numerous leadership roles at all levels and spanned in age from 26 to 61 years.

One of the most interesting themes that emerged from the data was the creation of networks of support that acted like mentoring "bodies" or groups for these women. One young African American assistant principal talked about mentoring in familial terms when she said:

> Funny that you say that [ask about mentoring] because I am sitting across from my little mentoring group and I always use to call them my aunties. They were very encouraging. Always encouraging. Still encouraging. Always saying, "You can do this. You can step out there. You can try to put your stuff out there." Sometimes it is not what you think. You may run into disappointments along the way…They were always there for the rebound saying, "You can pick yourself up. You can do it." And that was encouraging for me. And it wasn't just one person, it was a group of encouraging administrators. (p. 115)

The women participants in this study worked to lift one another up and, thus, took pride in one another's accomplishments. These women also had a keen understanding of networking, in contrast to women participants from other studies, and, furthermore, understood the visibility that having powerful mentorship afforded to them. Finally, due to the value these women placed on mentoring and networking one another, the act of "paying it forward" or creating a "pyramid effect" was critical to maintaining the foothold they had gained in leadership roles in their district.

> But I think little by little we are finding a few women who do have that capacity to mentor. I think another thing is that we've never seen ourselves in those roles because we've never had the experience…because how can you mentor if you do not have the experience [because you can't get a leadership position]? So now, when I find myself with 33 years of experience, surely I should have something to offer. But do you have to wait to get all this experience [before you can mentor]? (Sherman, Muñoz, & Pankake, 2008, p. 251)

After studying the influence of mentoring on leadership trajectories, it made sense to try to understand more about the act of mentoring itself. Instead of studying women principals' perspectives, two of my colleagues and I decided to probe the experiences and thinking of women who had made it to the superintendency, reasoning that these women would have had ample time as they moved up their career ladders to top leadership positions to experience some form of mentoring (see Sherman et al., 2008). Not surprisingly, all of the women interviewed were able to identify mentors who had played significant roles in their career advancement. However, when probed, they struggled to describe them in concrete, action-oriented ways supporting the notion that women have less developed mentoring systems (Glass, 2000). In actuality, while the women talked about people who had encouraged them to seek leadership roles, they served more as "voices" of inspiration rather than individuals who were willing to take action for these women. Definitions of mentoring indicate that it is active and deliberate rather than passive, including descriptors of the process such as teaching, coaching, advising, promoting, directing, protecting, and guiding (Brunner, 2000; Gardiner et al., 2000; Grogan, 1996; Kochan, 2002) leading us to question whether these women were authentically mentored.

Additional themes that emerged from the data included the lack of women role models (the fact that men hold the majority of top leadership positions places women at a disadvantage for mentoring), the isolationism of women who hold top district positions (many were the only women superintendents in their areas), the importance of simple "confidence boosters" (while probing the women about mentoring, we learned that "hearing" about their worthiness was vital to these women to gain confidence), and the challenge of being denied access to critical information, as indicated by the following comment:

> …Information is power and an organization that doesn't keep people [all people] informed or doesn't even want them to be informed, that is cruelty in first order. It shows that you don't trust them, that you don't respect them. If you really want to keep someone from growing or getting promoted, don't let them know what is going on. Keep the information away from them. (p. 251)
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> I believe I lead differently than the traditional man that I replaced. I respect him greatly and we have really great conversations. But, I know I'm a different leader than he was. He is very physical with the kids…A very physical kind of guy who grew up in the hood and he's kind of rough and tumbles with the kids on a regular basis. That's the kind of thing I could never do as the 5 foot Asian woman that I am. The person I replaced used to stand in the hallway and on the streets with a bull horn just going nuts, you know…doing his thing. And, that's something I don't think I could do. He'd just stand over…and teachers say this with some measure of pride and love, he'd stand over in the middle of the hallway kind of surveying his plantation as they called it. And, that's something like, okay, that's not something I would do or feel comfortable with. (Wrushen & Sherman, 2008, p. 461)

After gaining perspective on women's pathways to leadership positions, whether through formal or informal mentoring opportunities (or sheer desire and willpower), and learning of common difficulties shared by women such as balancing home and work lives and building leadership confidence, I was compelled to learn more about practicing women leaders from varying ethnic backgrounds and to make sense of the intersectionality of gender and race. So, a doctoral student and I designed a study (see Wrushen & Sherman, 2008) to examine multicultural women secondary principals' experiences (Note: Identifying and locating secondary women principals was difficult enough. Adding ethnicity into the mix made for a difficult sampling process). For minority women, though the intersection of race and gender doubly complicated their leadership experiences, gender worked more effectively against their success as leaders for most of the women. They described difficulties with stereotypical comparisons between their styles of leadership and that of their predecessors based on gendered perceptions of how principals should look and act. They also indicated a discomfort with the power inherent in their secondary principalships. The women tended to disown their power and preferred to describe themselves as servant leaders, facilitators, and team players. This propensity for "power with" strategies rather than "power over" tactics (Brunner, 2000) resulted from the belief that power is contradictory to servant leadership and inhibited them from owning their power and using it to enhance the success of their schools.

While gender was more often the most prominent challenge for the women participants, several comments were shared that indicated race was, indeed, an added challenge for some. One of the African American principals put it this way:

> Being a Black female in a leadership role is difficult in itself. Every position that I went into it seems like I was always the first [African-American in that role]. I was paving the way and, based on my actions, whether or not the door would be open for anyone [coming after] me. To me that was added pressure to do a good job because I wanted to make sure that since I was the first, I would not be the last. (p. 462)

While this woman experienced a complicated intersectionality while serving as a principal, another described her intersection as one that took prominence at a much younger age and impacted the very idea of whether she would even be allowed to obtain an advanced degree:

> My dad was Lebanese and my mom is Hispanic, so I was raised in a culture that is very conservative…The understanding of my dad was not as receptive when it came to pursuing anything beyond my bachelor's degree. He thought, "why do you need to continue?" (p. 459)
>
> I like to jump into classrooms and kind of co-teach along with the teachers and demystify some of the looks on kids' faces when they're not getting it. It's hard to go from that to demystifying this aloof leader that people want you to be. I do think as years go on, the principal role will be seen very differently. We all kind of grew up with this expectation of what a principal is supposed to be and I think that as we kind of change and smudge some of those edges, things will improve. Until then, people will struggle. (Sherman & Wrushen, 2009, p. 183)

So much data were collected from the study of multicultural women secondary principals that my colleague and I reported our findings in two separate articles (the one mentioned directly above and the one summarized here – see Sherman & Wrushen, 2009). The women unanimously described themselves as relational and collaborative leaders who took caution not to abuse their power and, instead, used it to empower those that surround them. They were proud of who they were as leaders, but struggled to break traditional leadership molds. In addition, while all of the women shared beliefs of a "greater power" beyond themselves, the Hispanic and African American women described themselves as specifically religious and spoke candidly about prayer to ground themselves and make good decisions.

Unique to these women's perspectives was the operationalization of their mentoring experiences (counter to the Sherman et al., 2008, study). In our opinion, this validated them as more authentic. Even more distinct was their report that these relationships were experienced with other women rather than men. The women described themselves as continuous learners who were servant and collaborative leaders. They spoke of being members of larger leadership teams who took the time to develop caring relationships with their school communities. This "activist mothering" (Naples, 2003) existed for these women, across ethnicity, as part of their caretaking roles as mothers, sisters, daughters, and wives. According to Harding (1991), emotional work has been relegated to women because of historical divisions and separation of labor between men and women. While emotional work was expected of them because of the historical separation between men and women (Harding), the fact that these women actually embraced this notion and strove to be relational leaders revealed their attempt to push traditional leadership paradigms outside of traditional masculine styles of leadership.

Finally, most of the women reported roadblocks to their success as leaders. According to Harding (1991), feminist standpoints are derived from perspectives on daily life. For these women, these obstacles were part of the "dailiness" of their lives as secondary school leaders. Distinct to this study was the finding that these roadblocks consistently came from other women leaders. One principal put it this way when describing the obstacles she had encountered:

> Another thing is not giving up information. And, I'll tell you that is one of the things…that not sharing of information is, I think, one of the most destructive things to leadership and shared leadership and healthy environments where you have to work with a number of administrators. And, I think that is frequently a tool that women use against one another. I spent my entire time to undo, supervise, monitor, and correct that one person instead of running the school. It was a nightmare. (p. 188)

Her frustration with having to combat sabotage lodged at her from an assistant principal was apparent. In summary, the women's individual standpoints formed a collective whole in most instances, meaning their experiences as practicing leaders were more similar than different across instances of both gender and ethnicity.

> Principal in Mid-30s
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> After meeting me, the superintendent told my principal that he could not hire me because I was too youthful. My principal pointed out that I was the most qualified applicant and that the district had hired several APs at the high school who had been younger than me. His reply was, "But they were men." (Sherman & Beaty, 2010, p. 24)

In my continued research on women and attempt to understand women's experiences from a multitude of perspectives, it became apparent to me that it might be telling to study women leaders across generations. Therefore, my colleague and

I shaped a study to examine women's experiences in the principalship across generations in the USA to capture perspectives of participants who were born around the same time and share similar historical experiences and to compare these with women born around different times and social experiences (see Sherman & Beaty, 2010). We framed our understanding of the data with feminist phase theory (Tetreault, 1985) which had been previously used to study how feminist thought was integrated into curricula. We interviewed young women principals, middle-aged women principals, and veteran principals at varying levels of school leadership. Though we expected that their experiences would be captured in the stages of feminist phase theory according to their cohorts, we found that the ages of the women were not always prevalent, as indicated by the following quotes from women of all ages in the study:

> I am much more of a nurturer than I believe is appreciated at the secondary level. I have found that my style of leadership is much more valued at the elementary level—with regard to students and teachers—by the board and the community. (p. 25)
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> This job is very demanding. There are days that I don't get home until nine o'clock at night. My husband is very supportive but I can tell it is wearing on him. I have started going home by six so that I can be 'Mommy' through dinner, homework and bedtime and then I get out my computer or paperwork and it's back to business. Honestly, I don't sleep a lot anymore. (p. 30)
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> My mother always wanted me to go to college but my daddy never really saw any value in that. It's not that he really cared if I went, he just did not see the need for me to do so. (p. 23)
>
> I graduated from high school and was set to attend [Research One University]—already had a room reserved. Then, for some reason, decided at the last minute to get married instead. After my first two children were born, I decided to go back to school. I loved math and wanted to major in accounting but my husband thought that education was a better choice for me because it worked better with the children's schedule. So that's what I did. I became an elementary math teacher. (p. 23)

We heard from veteran and middle-aged women that their husbands' careers dictated their career choices. We heard from all women the struggle to balance work and home expectations as women's role expectations have remained unchanged. And we heard very few instances where the women described making meaning of their leadership roles on their own terms. The women in this study, whether young or old, continued to struggle with stereotypical assumptions about leadership and balancing work and private lives indicating that while opportunities for leadership positions have increased, the expectation that women will perform to male standards has remained intact.

> I will tell you when I first started out, Dr. X used to call me little girl. I was like, "If she calls me little girl one more time…" I style my hair to look older, believe it or not, because my first secretary…they always thought she was the principal. Sometimes my looks will deceive people so I try to always have on a suit. (Sherman & Grogan, 2011, p. 16)

Women in educational leadership have been studied for years longer than the decade I have been in academia. The collection of literature that exists has helped us to better understand many of the challenges and motivations that define the work of women in positions that have been largely held by White men in the past. Yet, young women in these roles have not been well studied to date. In fact, the existing literature provides almost no data on young women's experiences in the principalship.

And the study I conducted on women leaders across generations yielded little difference in experiences with stereotypical assumptions and behaviors. With such a small sample of young women leaders in the study outlined above, I wanted to identify a larger group of young women principals to better understand how young women view the world and to look for any signs of a changing landscape in educational leadership. If young women see the world differently from their mothers and grandmothers, my colleague and I thought we might find some signs of differences in the way they go about the work of leadership, or at least some differences in what they hope to achieve with the power in that position. However, we also knew we might find that the discourse of educational leadership is so steeped in tradition that regardless of the way they see themselves, young women, like those women that have led schools and districts before them, feel the need to conform to certain norms and expectations that leave little room for self-expression or for putting their own stamp on leadership. Therefore, the purpose of this study (see Sherman & Grogan, 2011) was to seek out young women's experiences (40 years of age and younger) in the principalship in an attempt to understand and make sense of how gender impacts a new generation of women leaders.

At the time of the writing of this chapter, though my colleague and I continued to be immersed in data collection, several themes had begun to emerge. Women reported surviving the first years of their principalships only to emerge as stronger instructional leaders, community leaders, and models for other leaders in their districts, despite their young ages. Their community leadership was at an unprecedented level as they attended local churches and organizational meetings, served on the boards of the low-income housing projects that surrounded their schools, and established open-door policies for the parents of their students. Not surprisingly, they reported continuing to struggle with balancing their work and home lives. However, what we heard from these young women was that, unlike women leaders before them, the push to choose between having a work and home life (as experienced by many veteran women) was a nonissue. They reported having full knowledge of the difficulties that would face them and went full steam ahead and got married, had children, and sought leadership positions at young ages. They talked about the exhaustion they experienced because of juggling so many roles at once and, several reported significant health problems as a result of the stress.

One interesting theme that emerged from the preliminary data analysis was that all of the first six women we interviewed were African American women who were serving at-risk school populations. Furthermore, none of these women had experienced difficulty gaining their principalships despite their young ages, gender, and ethnicity. Instead, they served as "healers" in their districts and were moved from challenged school population to challenged school population, never having the chance to enjoy the fruits of their labor. Their mission was to "fix" one school and then move on to another. And this mission was forced upon them as the women reported exhaustion from this process and not being given the opportunity to turn down moves to multiple school environments (i.e., three schools in five years). As my colleague and I continued to identify young women principals and interview them for the ongoing study, simultaneous with the writing of this chapter, we knew we would need to modify our interview protocol and interview process to better probe the thinking and understanding of women principals and to ask questions as a result of the first data we collected such as: Are there more young women principals who are African American than of other ethnicities? Are African American young women principals abused as they are required to move to multiple at-risk school environments that other leaders refuse to take on? What will be the implications for young women who have developed health issues in their early years as principals if they remain in the profession?

Giving Significance to the Bricolage

According to Stern (2008), collage, or, for the purposes of this chapter, bricolage, influences the perception of the viewer (reader), making the relationship between the observer and the piece of work more meaningful. Returning to the questions I posed at the beginning of the chapter: Has gender been a useful category of analysis (Scott, 1987) in my scholarship? And what significance does this collection of counter narratives hold? Without question, mentoring impacts self-confidence, leadership trajectories, and leadership practice (Note: The meaning I attempt to make here is bounded to the population of participants of the studies outlined in this chapter). Almost all of the participants of these studies recognized the importance of having mentors and validated the practice of mentoring as an important influence on the pathway to leadership positions. However, men and women experienced mentoring in different ways. Men were more often encouraged to apply for leadership positions and tapped as individuals to promote as principals. Women were not often encouraged to apply for leadership positions and suffered from an overall lack of women role models and mentors. Women struggled to identify mentoring that was action-oriented in most cases. Those who were the exceptions often spoke of mentoring as a network of “activist mothering” (Naples, 2003) that helped them pay it forward and, perhaps, negate competition among themselves by taking ownership of the success of other women leaders and aspiring leaders. This notion of “activist mothering” can be applied to the higher education setting by veteran women scholars taking ownership of the success of women new to the field, much as I have tried to do in my efforts to help women doctoral students and colleagues new to the field establish themselves through research endeavors (for more information on women’s experiences in higher education, see Newcomb, Beaty, Sanzo, & Peters-Hawkins, 2013; Sherman, 2010; Sherman, Beaty, Crum, & Peters, 2010). In regard to formal mentoring, few participants valued these leadership preparation programs and were suspicious of their intentions, indicating that this form of mentoring has not escaped the weaknesses identified in informal mentoring processes. These programs fell prey to promoting the status quo and were not found to promote more women into leadership positions.

Being denied access to information was as detrimental as the lack of access to mentoring for women. Information is power. Whether women were denied information/recognition (confidence boosters) about their potential as future leaders, whether they were never explained the hidden rules of the leadership process of a district, or whether they were actively sabotaged by others in their districts, the lack of access to knowledge was effective at keeping the numbers of women in leadership positions down. One of the most concrete examples of the lack of access to information was the misunderstanding that many women had of networking. The fact that men knew how to network for power and positioning with those in leadership positions in districts (and had, indeed, been networked themselves) and, instead, women spoke of networking in relation to getting along with fellow teachers spoke volumes about hidden rules that kept women aloof from pathways to leadership positions.

Without a doubt, women of all ethnicities and ages struggled to gain a balance between their work and home lives. They worked their first shifts as school and district leaders and then took on second shifts when they got home and filled gendered expectations for their roles as wives and mothers. The women wore multiple hats to demonstrate their capabilities as future and practicing leaders and practiced a “never let them see you sweat” mentality. However, behind closed doors, the women admitted exhaustion from their daily efforts to be “superwomen” and described consequences such as broken marriages and poor health.

Curriculum leadership was a strength for the women, and, for the most part, they embraced relational work – and were good at it – by making connections with students, parents, teachers, and their surrounding communities. However, many of the women expressed explicit discomfort with the inherent power of their leadership positions and struggled with the binary oppositions that held their roles as leaders and wives/mothers in competition. They expressed desires to change notions of power and to associate new language with their leadership styles such as “collaborative” and “servant.” For women in the university setting, this means creating research networks with other women scholars across national and international settings and empowering one another through collaboration (collaborative power being more comfortable for many women rather than singular power).

While intersectionalities between ethnicity and gender complicated many women’s experiences as leaders, biases related to gender were recognized and described as most prominent by these women. Some women failed to recognize biased behaviors when asked about their experiences with them, but, in deeper discussions with me, described instances where they had been explicitly impacted by stereotypical assumptions and behaviors. Sadly, across generations, women’s descriptions of their leadership experiences varied only minimally, indicating that policies sometimes failed to bring about changes in practice (and certainly not changes in beliefs or assumptions). And, at the time of the writing of this chapter, data that were collected on young women leaders pointed toward serious health consequences from holding principalship positions for young African American women who may have been abused by their districts as they were expected to reform the most difficult of schools repeatedly.

In short, gender has been, and continues to be, a useful category of analysis for myself and for other feminist scholars. Countless voices have been added to the leadership "story" that may have remained silent without this work. These women's counternarratives have both practical and political significance for those of us who hope to move the study of women forward for the purpose of increasing their numbers and successes in educational leadership roles. We know a good deal about women's ways of leading from existing research. We have less information on how collaborative and relational leadership is linked, through empirical studies, to student achievement and school success. And it is not clear how we can move beyond the "gendered" language of leadership to that which focuses on best practice rather than "feminine" and "masculine" styles of leadership. We must expand our ideas of what leadership can and should look like and promote these reconceptualizations of leadership in our preparation programs so that when our graduates move into practical settings, leadership practice and notions of leadership will be transformed.

We know that women have struggled, and continue to struggle, balancing their home and work lives. This has not changed across time in the literature on women leaders. Why are we still talking about this? Because nothing has changed. And why has nothing changed? Because the reconceptualization of men and women's societal roles have, largely, remained unchanged. It is difficult to transform leadership practice and role expectations in education when resocialization is needed on a more global level. Can gender and leadership be redefined without social restructuring? Until such a time, we might work smarter and more diligently toward investigating notions of job sharing in school leadership (i.e., coprincipals) as well as forcing policies that make on-campus childcare a mandatory option for women principals who are also primary caretakers of their children. At the very least, we need to know more about how affirmative action and family policies have been implemented and how they have or have not been useful.

We know that many women have been left out of both formal and informal mentoring opportunities. We must now take this knowledge and work specifically to actively promote and recruit women into top leadership positions (in both K-12 and university settings). We must make ourselves and the women we study active participants in an agenda for change. We can and should create networks of support for ourselves, both feminist scholars and practicing women leaders, if for no other reason than to ensure our own survival! This requires specific efforts toward mentor pairing between prospective/new and veteran women leaders, professional development for those who will be engaged in the work of mentoring and for districts needing to operationalize best mentoring practices to "grow their own," the study of expanded notions of mentoring through greater networking actions, the promotion of mentoring practice by those who are involved in leadership preparation at the university setting (mentoring should be included in course/program content so that graduates can enter leadership positions ready to mentor and bring others along the leadership continuum), and pointed efforts at feminist research collaborations between women scholars in the university.

Finally, we should ask whether our research methods have best accommodated women and their stories. Are these same methods best for understanding the experiences of a new generation of women leaders and how they make sense of and define leadership? Do young women make meaning of leadership the same way their mothers and grandmothers did? Do we need to expand our methods for understanding? Are we asking the right questions so that our investigations yield a new history (Scott, 1987)? Should we look at old questions from new perspectives or frame new questions for new perspectives? Should we continue to look across our work and create larger bricolages? Perhaps we need to continue our efforts in some cases but expand our "samples" of women to better gauge what women's experiences are from an increased multicultural and global perspective. Perhaps universities should reconsider tenure structures than value single-author research over collaborative efforts at research. Furthermore, the fight for equity is much more advanced in the USA when compared to many other countries that are still struggling to make the education of girls a possibility and priority. How can we, as US feminist scholars, become more politically active to expand our fight for social justice to ensure the survival of girls and women worldwide?

It was my hope that the words of the women participants of my studies would give voice to many who have not been heard and inspire additional research on women leaders. It has also been my hope that more women will learn to claim rather than receive their leadership roles (Rich, as cited in Martin, 1985) and, eventually, help the field of education lay claim to best leadership practice through consciousness raising, the setting and attainment of new goals, and the integration of new scholarship (Martin, 1985). Much has been left unheard. And, as long as more is to be learned and the devaluation and exclusion of women in leadership continues, an appreciation can be gained from women who have managed to achieve and thrive in school and district leadership positions (Harding, 1991). We must now be more pointed in our research on women and build upon that which we already know. We need to identify where change can be initiated and take place. Our work must now be politically directed toward change, and figuring out how best to do this is the challenge for the next generation of feminist scholars working side by side with veteran women scholars.

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Chapter 13
How Should Researchers Act in the Context of Social Injustice? Reflections on the Role of the Researcher as a Social Justice Leader

Dilys Schoorman

Critical scholars, community activists, and journalists remind us that there is injustice in the world. In turn, *many* of us, professors in colleges of education, establish this fact in our teaching. We draw attention to a wide range of disparities and inequities such as governmental overreach and abuse of human rights in diverse contexts, the lack of equal opportunities and access to basic services, and the deliberate cultural, social, political, and economic marginalization of particular groups. In the USA, recognizing the potential role of education in ameliorating or exacerbating these conditions, we urge our students – especially teachers, principals, counselors, and educational administrators – that they can and should make a tangible difference in the lives of students and families who have been marginalized by social structures (that privilege the wealthy 1 %, and middle-class White Americans who remain the normative "mainstream" (Christensen, 2000, 2009; Oakes & Lipton, 2003; Wink, 2004)). In *some* courses we address the international/global dimensions of social (in)justice focusing on the ravages of globalization, conflict, environmental degradation, poverty, political corruption, intra-national and international disparities in human rights, opportunities and access (Au & Apple, 2004; Bigelow & Peterson, 2002). Or we contemplate how some countries have moved toward greater parity on some of these aspects. It is in this multicultural and/or global contextualization of these courses that we are able to begin the conversations about social justice locally or globally.

Yet, in the previous paragraph you will noticed that I italicized the words "many" and "some" to underscore that multicultural or global contextualizations and, by extension, discussions of social justice are neither routine, inevitable, nor commonplace. Indeed, courses that address such ideas are – still – somewhat marginalized

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in the USA, even within colleges of education. And yet, one cannot escape the link between social (in)justice and the role of education/educators in our global history. Our perspectives on research have been significantly shaped by the recognition that the atrocities of Nuremburg were committed by those deemed educated. Education has been as central to the establishment of social justice as in the access to education for African Americans in antebellum and postbellum USA and for girls and women in many nations around the world, just as education/educators have served the purposes of injustice as an agent of deculturalization and colonization (Spring, 2010). This history reminds us of the central role of the educator in the context of social justice, as emphasized in this note to teachers[1]:

> Dear Teacher:
> I am the survivor of a concentration camp. My eyes have seen what no one should witness:
> Gas chambers built by *learned* engineers.
> Children poisoned by *educated* physicians.
> Infants killed by *trained* nurses.
> Women and babies shot and burned by *high school* and *college graduates*.
> So I am suspicious of education.
> My request is: Help your students become human. Your efforts must never produce learned monsters, skilled psychopaths, educated Eichmanns.
> Reading, writing, arithmetic are important only if they serve to make our children more human.

This applies as much, perhaps even more particularly, to those of us who teach educational research. To echo Bogotch (2008), educational researchers need "to become *more political* internationally, nationally and locally, *more active* socially in their communities and organizations, and *more critical* of existing educational theories and practices" (p. 80).

Is Social Justice Central to Our Roles as Educational Researchers?

I was fortunate to attend a presentation by Paul Rusesabagina, whose courage during the Rwandan genocide was highlighted in the film *Hotel Rwanda*. In his presentation he voiced his surprise and puzzlement about being hailed as a hero and noted that he was simply doing his job – as a hotel manager (see also Crockett, n.d.). So, if a hotel manager could find a way to frame his courage and heroism in the context of terror as "simply doing his job," how might educators, and particularly educational researchers, consider social justice praxis as "simply doing our job"?

As suggested previously, we first need to be conscious about the existence of social injustice, be committed to the principles of social justice in order to actively participate in addressing such injustice. Even as we work hard to help our students acquire critical consciousness about a variety of social injustices, and their own positions of privilege in the perpetuation of that reality, we are also similarly challenged to examine our own roles in perpetuating systems of power and privilege.

Do we expect our students to engage in activities that are justice-oriented within school and community settings, but remain satisfied that our classroom conversations about injustice are an adequate contribution for us to be making? How do we respond to the fact that social justice-oriented curriculum remains marginalized in our programs – and has made little movement beyond these margins? For those of us in nations/contexts where social justice pedagogy does not amount to treason or a death threat, what is our obligation to our colleagues in places where it is?

How should educational researchers act in the context of social injustice? This chapter will focus on the manner in which we can become leaders for social justice in this often-neglected arena: our role as researchers. I will explore my own struggle with this question and the insights that have emerged in my professional journey. No doubt, researcher positionality will emerge as significant, whether in my role as a full professor now and the attendant obligations that such a rank brings (in my view) to the social justice project, as a critical multicultural educator whose philosophical grounding in critical pedagogy offers a logical linkage to my conceptualization of the obligations of a social justice researcher, or as a transnational whose annual trips to the nation of my birth is grounded in an obligation to "give back" as well to be "reminded again" of the unique challenges of critical education and justice-oriented work in international settings. This chapter seeks to trouble our received epistemologies, research ethics, and our conscience as researchers, to begin a conversation on new and bold pathways for research that matters – especially within communities that have been marginalized by research practices.

Being Leaders as Researchers

For many of us, our education as researchers required us to be dutiful followers, not epistemological leaders. As Burdick and Sandlin (2010) note, most acceptable educational research imposed by colleges of education and scholarly review processes offer a bounded possibility of what counts, "collapsing the very concept of *education* into the practice of *schooling*" (p. 350). Regardless of whether we used quantitative or qualitative data, a positivist or constructivist paradigm, "good" research was defined in terms of methodological precision and fidelity (Hostetler, 2005; Yanchar, Gantt, & Clay 2005). Furthermore, "ethical" research required that we minimized harm and left the researched untouched by the research, and researcher bias or positionality was viewed as a weakness to be minimized. As students, we rarely questioned these positions. Instead, we typically appointed to our doctoral committees a "methodologist" who would make sure that we knew and followed the rules of educational research as a requisite for graduation.

As a consequence, when it comes to leadership for social justice, we do have too few *research* leaders among our programs and colleges of education. Even when studies of leadership itself engage significant issues of social injustice, it is unclear if the researchers have been able to escape the "followership" mentality in which they were schooled methodologically. Quoting Roberts, Yanchar, Gantt & Clay (2005), warned about such "methodolatry" (p. 351), where research became "the habitual application of some formulaic mode of inquiry to a set of quasi-problems chosen chiefly because of their compatibility with the adopted method" (p. 28). Instead, drawing on Villaverde, Kincheloe and McLaren (2005) advocate research that attains and retains a "a vision of not yet" (p. 309). To accomplish this, our first step as research leaders for social justice is to face up to the observation that "mainstream research practices are generally, although most often unwittingly, implicated in the reproduction of systems of class, race, and gender oppression" (Kincheloe & McLaren, p. 304). Indigenous scholars have viewed research as a dirty word, arguing that "it is time to dismantle, deconstruct and decolonize Western epistemologies from within" (Denzin & Lincoln, 2008, p. ix.) To what extent is our own research implicated in these criticisms?

What if we, as a scholarly community, reframed educational research as counter-hegemonic praxis and made such a stance more central, rather than peripheral, to the discourse on educational research? Might we ask this of ourselves and of the next generation of scholars that we mentor? To what extent have we begun this process in our spheres of influence? A central commitment to leadership for social justice is our willingness and ability to forge new pathways for research that view epistemology and methodology in terms of their emancipatory potential.

Critical Pedagogy, Social Justice, and the Research Undertaking

The writings of Freire (2000), elaborated on by McLaren, Giroux, Kincheloe, and Sleeter, have served as the basis of critical pedagogy for multicultural educators and remind us that education – including courses and discourses about research methodology – have emancipatory and oppressive potentialities. In *Pedagogy of the Oppressed*, Freire makes us all critically aware of how the traditional processes of education serve to perpetuate hegemonic structures that privilege the oppressors and marginalize the oppressed. Central to this process is the "banking approach" where generations of students are taught to be passive, obedient, and unquestioning of teacher-centered instructional approaches. Scholars of critical pedagogy remind us that our scholarly pursuits must be understood as political and, in the context of social injustice, can hardly be viewed as "neutral"; indeed, the pursuit of equity and social justice should be central to any educational endeavor. Critical pedagogy calls for educators to facilitate a process of conscientization among the community of learners where particularly the marginalized are able to acquire critical consciousness about the processes and structures that limit their power. Freire notes that education should be humanizing, thus making the scholar one who is more in touch with his/her humanity and those of others. Critical pedagogy as problem-posing dialogue, occurring between/among teacher-learners and learner-teachers, in a generative praxis of reflection and action, draws into question the parallel role of researcher as expert vis-à-vis the researched. Ultimately, our scholarly endeavors must be undertaken as liberatory praxis for all involved.

The implications of Freire's work for those of us educated as researchers through pedagogies that were oppressive are significant. Our epistemologies could be either scholarly straightjackets that constrain and fetter our work or they could offer a generative impulse to free the researcher and the researched to engage in scholarly pursuits that are inherently and/or potentially emancipatory. Too often, however, our "schooling" as researchers reinforces the "banking" approach to our own scholarly investigations, resulting in an unfortunate failure to use our knowledge as researchers within a problem-posing context. So what *should* it mean to do critical or social justice research?

One must necessarily be cautious about the claim of doing social justice research. Following the argument of Montano, Lopez-Torres, and DeLissovoy (2002) with regard to teachers who are social justice activists, it is useful to distinguish between research that is inspired by concerns about social injustice or beliefs in social justice and those that are, in *effect*, social justice undertakings. To this end I advocate the following list of characteristics that encompass the intent, process, and outcomes of a research project, as an *ideal* conceptualization of social justice research. It is a research undertaking where:

- The rationale for the study is grounded in extant social injustices.
- The goals/purpose of the study is to minimize/eliminate the injustices or the conditions that gave rise to them.
- The research questions emerge from the interests of the researched who are marginalized by the injustices.
- The underlying epistemological stance is one that reflects research *with* the researched not simply research *on* them.
- Research design and methodologies reflect multiple loci of expertise (where the researchers are not perceived as the sole "experts" and where community members' value as co-researchers is recognized).
- Participation in the research process is viewed as beneficial or emancipatory by both the researcher and the researched.
- The outcome of the research process is the alleviation, amelioration, or elimination of a facet of the injustice that gave rise to the study.

Granting that this is my idealized notion of what social justice research *should* be and, concomitantly, how I should conduct myself as a researcher, I will now reflect on how I have come to these ideas in my own work/journey as a scholar.

For most of my life as a scholar, my research has focused on issues of critical significance; that is, I have always been preoccupied by issues of power and privilege, at some level. Like many multicultural educators, the work that I did as a teacher educator spilled over into my research agenda. I adopted critical theoretical frameworks, asked questions about rhetoric vs. action, framed analyses in terms of divergent ideological perspectives, investigated the concerns of specific marginalized groups, and engaged in reflexivity as a researcher. Yet, I have been cautious about claiming any of this work as "social justice" research.

Commenting on our use of "multicultural/social justice" in a previous paper, we note, "While we are confident that critical multiculturalism is exemplified in our perspectives, social justice is sometimes a goal to which we aspire … hence the use of both terms to signify from whence we come (philosophically) and where we hope to go" (Schoorman & Bogotch, 2010, p. 250). There are two issues embedded here. The first is a reluctance about false claims. I did not want to tout myself as a social justice researcher when I was not. The second is a question of intent. If I did not set out to engage in social justice research, is it even possible to imagine my research as social justice praxis? The assertion that I make here, as a contribution to our ongoing debate and discussion, is that we need to be intentionally social justice researchers and not engage in such scholarship by accident or by default. After all, leadership is intentional and conscious, right?

The characteristics of my "ideal" conceptualization of social justice research derive from the work of researchers within the critical paradigm and advocates of critical pedagogy and social justice pedagogy in multicultural education. As Oakes and Lipton (2003) note of the purpose of critical pedagogy, "identifying the rawest social sores and refusing to be polite about them" (p. 289) is in itself a noble task. However, writing *about* social injustices is merely a starting point for movement toward social justice; the process and outcomes of such research matter as well. In outlining a new paradigm for educational research, Anyon (2005) urges us to document and describe oppression, study the powerful, assess efforts of urban communities to create power and opportunity, study social movements, study student activists, and investigate ways to make schools movement-building spaces. As implied by the progression of recommendations in this list, we cannot be satisfied by the topics and focus of our research. We must be concerned about the broader, public purpose and impact of our work.

This concern was central to my work with a Maya immigrant community in a family literacy program. As a multicultural educator, my writing about this underrepresented group could well have been valued within the research community for its exoticizing potentiality, with little impact on the group or its staff. Concerned about the potential that my work would unwittingly "recolonize" the Maya, I entered the relationship with this community with explicit requests and directions. I provided the staff a document that discussed principles of family literacy research in which Taylor (1997) noted the following:

- Questions need to be asked about the extent to which academic research on families and literacy is conducted for personal gain in the form of financial and/or professional advancement.
- Questions should also be asked about the relevance of the research to the everyday lives of families who participate in literacy studies.
- The family's well-being and personal needs and interests should always override the personal needs and interests of the researcher (p. 70).

We agreed that, outside of an initial evaluation of the program, all research publications would contain the name(s) of appropriate members of the community, that all "data" related to the community would be housed and owned by the program, that the development of research papers and authorship would always be explicitly discussed, and that all research would be primarily in the interest of the families and the program, especially with regard to vulnerability. It is primarily my 7-year experience with this group, including a sabbatical, that has given rise to my "ideal" conceptualization of social justice research. This rethinking of the purpose and impact of research is aptly summarized by Ladson-Billings (2005):

> The work we have to do must be done in the public interest.… The questions we pursue, the projects we choose, the agenda we champion have to be about more than career advancement. If educational research is going to matter, then we have to make it matter in the lives of people around real issues (p. 10).

Just as critical multiculturalists have raised questions about *whose* knowledge is central to school curriculum, and to the politics of the knowledge construction process, we must pay attention to how our own research questions are derived. In a recent study that drew less than expected enthusiasm among our research participants who were teachers, we came to the conclusion that in order to engage local communities of practice in collaborative research, we needed to ask questions that were of interest to them. Instead of entering the research *on* others with a priori questions, research *with* others begins with the questions relevant to the community, casting the research undertaking as the researcher's service to the community. "As most of our projects emerged from our service work, we have now re-conceptualized our research as service. 'Research as service' emphasizes the notion that such an activity needs to serve a greater good than merely the urgency to 'get another paper out' within a 'publish or perish' institutional context" (Schoorman & Bogotch, 2010, p. 261). This was an idea I reinforced in my written self-evaluation and oral presentation to our college's promotion and tenure committee, in an effort to begin the conversation and the reconceptualization among the key decision makers on what we value as educational research.

Freire's (2000) notion of dialogic instruction is instructive in the research context as well. Instead of the traditional model of researcher-centered investigations, collaborative research that engages the researched in mutual investigation of a community problem could enhance the catalytic validity (Lather, 1986) of the study: "the reality-altering impact of the research process itself (where) respondents gain self-understanding and, ideally, self-determination through research participation" (p. 67). Collaboration with communities to whom the research is most salient is more likely to enhance the potential of the investigation to make a difference in the lives of the researched and the context of the injustice. Up for debate is who should be able to claim the title of "social justice" to describe the results of a study: Is it appropriate that the researcher makes this claim, or is it something that those who experience the injustice must acknowledge?

Collaboration between the researcher and the researched also minimizes the potential for researcher to act as sole "expert" or engage in missionary or rescuer roles where the researched are viewed as passive and helpless. Such collaboration underscores the need for the researchers to be immersed in communities of practice so that they may learn more deeply about the injustices that they investigate and their role in perpetuating or challenging the power dynamics that result in injustice. To this end, critical reflexivity is central to the entire research process.

Research Leadership for Social Justice in International Contexts

Conducting research in international contexts calls for heightened reflexivity among researchers. In addition to the concerns about the intent, benefit, process, and effect of research, we must recognize that the contours of injustice in diverse contexts make research not merely counter-hegemonic but also life-threatening. Thus, it is important that my own list of characteristics for desired research practice not impede the potential for researchers to lead in unique and unusual ways. It is at this juncture that I currently find myself professionally.

I left Sri Lanka, the country of my birth, as an adult, at a time of conflict that was both ethnic and political. My reconnection with the country as a professional began in the same way as much of my community-based research in the USA: a commitment to serve. Over the past 5 years, I have returned to Sri Lanka to offer teacher-training workshops free of charge in school and university settings. Granted, these are in settings where I have personal connections and in Colombo, the capital, where teachers and students are the "best off" in all dimensions of educational opportunity. I do not claim that this is social justice work; however, it has allowed me to come to the important insights about international work in the context of social justice.

It was vital to me that I offered my expertise – but listened very carefully to what the leaders in each context told me that they needed. While many indicated that they were starved for any kind of meaningful professional development, that they were very interested in learning about "what we did" in the USA, it was important to me to establish that the west did not have all the answers, and that we experienced similar struggles about engaging all learners, avoiding "teaching to the test," and addressing the pressures of standardized high-stakes testing and stilted curriculum. Operating in my favor was a healthy stance of insider-outsider positioning. I worked with local colleagues who served as critical friends to ensure that I had not "lost touch" with my local roots and whetted my US-based ideas for local implementation; with my audiences I highlighted the strengths of local practice that had helped me in my own professional journey. Thus, in a postcolonial context where attitudes toward the USA (the west in general) ranged from "the west knows best" to a suspicion of anything western, establishing a stance of mutuality was important.

Yet, there were topics that were strictly out of bounds. Although as a multicultural educator in the USA I had become comfortable talking openly and explicitly about the politics of race, language, class, and gender, these remained largely taboo topics among my audiences. Although principals and education directors acknowledged this as an important issue to address, and we did manage to conduct one highly choreographed workshop on race with a carefully selected group of teachers, it is work that is distinctly problematic. My work in Sri Lanka has yielded many such "danger zones." While it is not always clear exactly where the danger lies, how it will be realized, or whether it is perceived or real, the caution of my critical friends is tangible. What, then, does a responsible researcher do? Should one write about it under an assumed name, so as to protect family members or informants who might be tracked down? Should one make sure that one's writing "helps the country and the children" (as one informant hoped) and not write until one was sure that the primary beneficiary of such scholarship would be the marginalized? What does one do with the litany of injustices that an informant provided about education in the country but who declined to be acknowledged as an author? How does one record for a 'western' audience the data collection processes, when your sources would rather not be identified? What does it mean to be research leaders in such a context?

An example from the world of journalism might prove instructive, even if too extreme for some. In January 2009, when governmental pressure against the media was high and the civil war was taking its toll on the nation's patience, the outspoken editor of an independent Sri Lankan newspaper, The Sunday Leader, was assassinated. His newspaper had been a refreshing and courageous voice against governmental overreach. Ironically, the weekend after his death, the paper published his final editorial, which he had written in anticipation of his death (see: http://www.thesundayleader.lk/20090111/editorial-.htm). Lasantha Wickrematunge's last editorial is a succinct reminder to all journalists and students of journalism of what it means to be a leader for social justice in his profession. It was a choice that he consciously made; he had other options. He knew this work was dangerous and could cost him his life. This is what leadership often looks like in some parts of the world. How might educational leaders, especially those that seek to be leaders in social justice research, learn from Wickrematunge's example? Is there anything to be learned?

While as a Sri Lankan I find the entire editorial instructive, I'd like to discuss a few quotations and their links to our work as educators, educational researchers, and leaders in diverse international contexts.

> No other profession calls on its practitioners to lay down their lives for their art save the armed forces and, in Sri Lanka, journalism.

There are (and have been) situations around the world where educators are at similar risk for engaging in their professional practice. The educators of Afghan girls who dare to seek an education who are threatened each day for what they do (Nelson, 2009), the members of the semiunderground Baha'i Institute for Higher Education who are committed to providing an education to students of the Baha'i faith currently banned from a university education in Iran (see educationunderfire.com), and the educators in Iraq for whom simply showing up at work was an act of courage (Beaumont, 2006) are a few examples. Many activists use their positions within political structures to advocate for better educational opportunities, or who work to undermine political corruption (where the public's 'rights' to an education are interpreted as favors and often come only at the expense of a bribe). The question is: What is the response of the educational researcher to such a context? To what extent have we, as educational researchers, entered such "danger zones," and how have they made us better (i.e., more responsible and responsive) researchers?

Wickrematunge (2009) notes:

> But there is a calling that is yet above high office, fame, lucre and security. It is the call of conscience.… The investigative articles we print are supported by documentary evidence thanks to the public-spiritedness of citizens who at great risk to themselves pass on this material to us…. But if we do not speak out now, there will be no one left to speak for those who cannot…

As a journalist, he saw it as important to write. Does the same apply to us, as educational researchers? While journalism seeks to bring about public awareness, what is the purpose of the writing of educational researchers? How do we manage the danger in which we place others, as well as ourselves? While the social justice research leader might be a person willing to risk his/her own life for a cause, how should that endangerment be viewed in the context of others' welfare and that of the cause?

These are some of the struggles and insights of my experiences, including the invitation to write in this handbook. While writing about injustice could well be an act of courage in some instances, my own assessment is that I should not write in a manner that places others at greater risk than I place myself. Furthermore, operating in a culture where one is constantly told to publish or perish, or to "write up" practically everything they experience, I find that the deliberate choice not to publish is an act of leadership. It is important to me that I commit to *not* write about the perils of others simply to burnish my own credentials as a scholar. Instead, I re-commit to more creative and diligent service, operating 'under the radar' to address the injustices for which international colleagues risk their lives, professions and family wellbeing.

A second example from public discourse on injustice in Sri Lanka more directly linked to education is a newspaper article that provides a detailed overview of the concerns of many students in many countries (see http://sinhale.wordpress.com/2010/05/08/p-a-ruwan-nandika-is-next-big-threat-to-the-regime/). The case presented by Seneviratne (2010) in this letter addresses the meaningfulness of the General Certificate of Education Ordinary Level Examination that is taken at the end of tenth grade and is the gateway to Advanced Level study that leads to university entrance.

> Pitipana Arachchige Ruwan Nandika is 17 years old. He is one of the 272,640 children who sat for the GCE O/L Examination in December 2009. Let's be more specific. He is one of the 129,640 (47 %) who failed to qualify for the A/Ls. He is one of the 57 per cent who failed Mathematics. He attended one of the 27 schools that did not have a single student qualifying for the A/L. He is one of the 63 per cent who failed English and one of the 52 per cent who failed Science. He is one of the 21,813 who failed all subjects. Needless to say, he also belongs to that strange club of the 90 per cent who failed to solve the 'compulsory' geometry problem in the Mathematics paper.

Despite the particulars of the context and the statistics, what is presented here is, sadly and increasingly, familiar to many around the world. It is clear that the educational system has failed this and many other students. The roots of the failure encompass a tangle web of limited resources, ineffective decision-making and policy structures, political pressure and gamesmanship, inadequate teacher education, and carelessly written textbooks. How does the social justice researcher "enter" this context? How might she/he provide leadership?

It might be worthwhile for us to ask ourselves at which point the numbers cited above become "acceptable"; when do they cross the line from "injustice" to something we can accept as reasonable? If a 47 % failure rate is unacceptable, what would be acceptable? How do we justify our own choices of acceptable numbers?

At which point do we express our outrage about the national state of educational achievement and opportunity, and where do we place blame and responsibility for its status? Yet, we must also recognize that the failure rate is not the important statistic on which to focus; that is too easily resolved by lowering the passing grade. We must, instead, examine the context within which failure occurs. The fact that a child like Nandika did not appear to have a chance the minute he entered his school, one of 27 schools where no student passed the examination, must concern all of us. There are too many Nandikas around the world and in our own backyards.

Addressing the challenges of leadership for social justice within an international context draws our attention to both the unique conditions within which social injustices emerge and must be addressed, as well as the underlying commonalties that surface across contexts. Although it is likely that an educational researcher might feel ineffective in the struggle toward social justice, there are many insights that emerge from such struggle that could advance research in general and social justice research in particular.

Perhaps, analogous to our recommendation of study abroad for undergraduates, it might be instructive for all educational researchers to experience a social justice struggle with a group of people and to engage in authentic problem solving *unrelated to a publication opportunity*. Freeing oneself from the pressures to publish as one enters such experiences has been important to me; it protects the host community from researcher overreach and exploitation and emancipates the researcher to learn and serve without the specter of narrow accountability measures of the publication-obsessed professional world in which we live. Just like study abroad, we enter into a world where the rules (and life) are different – and that is the point of the experience. I have undoubtedly grown as an educator and researcher since my sabbatical among the Maya when I was welcomed to "the university of the poor" in "the Third World in the First World." Yet, I also remember being extremely worried at the end of the sabbatical that I had not written as much as I intended to, initially seeing my experience as a failure rather than the transformative opportunity that it really was.

Leading the Next Generation of Social Justice Researchers

Throughout this chapter, I have underscored the need for us to be research leaders in the context of social justice. As someone not schooled in an educational leadership program, let me explain what I mean. It means going where others have not been before, forging new pathways, and, in so doing, paving the way for others to follow and – perhaps – create further paths. Leadership occurs in the micro contexts of daily professional interactions, in the classroom, mentoring relationships, committee meetings, dissertation defenses, and program design, as much as it occurs in decisions about our own research agendas. I see my role as a faculty member as great opportunity for such leadership. I now see such leadership as a responsibility.

An international handbook of social justice leadership requires that we place our work within a broader global context; we learn from this broader global context but return to do our work in very local and particular contexts. Thus, the imperative to "think globally, act locally" while clichéd is also imperative. As researchers, we cannot think globally unless we travel – either to different countries or different worlds within our own communities. It is through such relocation that we move out of the proverbial ivory tower to engage with communities in current struggles that need the leadership and collaboration of university researchers. In an international context, where universities in nations such as the USA host so many researchers from around the world, it makes sense that we view a desired global shift toward justice-oriented research as beginning with our own programs.

Regardless of our choices about stepping out of our comfort zones and into "foreign" territories where we unlearn, relearn, and sharpen skills as researchers, we do have responsibilities to the students we teach and mentor. We can hardly have students read about the social injustices perpetuated within education (global) and emulate the same oppressive practices ourselves, as educators (local). Furthermore, we have an obligation to ensure that we do not perpetuate in the graduate education of the next generation of scholars, a hegemonic approach to research, especially research that involves marginalized populations. Whether we like it or not, we must be leaders within this context.

I conclude this chapter with a statement of commitments I wish to make – to my students, in particular, and to my colleagues, more generally – as I contemplate my potential/emerging role as a research leader in social justice.

Lead/Teach/Research by Example

It is extremely important that our students see us practicing what we preach. I recently offered a new doctoral course that focused on critical theory in educational research. What I found was that I was able to explain much of the theory critical research through my own field experiences. My 7-year relationship with a community-based education program that offered family literacy to preliterate Guatemalan Maya immigrant women was particularly instructive in understanding the theory and the practice of critical ethnography, collaborative research, critical interviews and case study, bricolage, standpoint theory, reflexivity, and catalytic validity.

I have also learned that leading as a researcher is not only engaging in/with specific communities of practice, teaching, or engaging in scholarship on social justice; it is about owning the label "social justice" as attached to your work and discussing it in terms of your ability to live up to its central tenets. As I note earlier, it is a label that I have been reticent to use, because I have been intimidated about being unable to live up to its promise. While it might be professionally dangerous for some to use this label, that is not the case for me; so it is important that I am open about my work and let students and colleagues know that there are allies in this work.

That said, leading by example is an ongoing challenge, especially as we work in contexts where it is easier to be a follower or to focus on what ought to be done instead of doing it. Our institutional criteria for exemplary practice frequently marginalize the types of research, and the publication outlets for social justice work and minimize the community practice that is central to such a research agenda. As a faculty member who no longer has the pressures of promotion and tenure (at least in my current institution), I must – by example – actively commit to reframing social justice work as rigorous, relevant, and valid in all institutional contexts within which "acceptability" of research is discussed: promotion and tenure guidelines, dissertation proposals, peer review of journal articles and conferences, and competitions for research awards.

Create Spaces for Social Justice Research

My proposal for the new course on critical theory in educational research received some opposition from colleagues who were "research methodologists" – an indication that the course was simultaneously threatening in some way but also deemed irrelevant or unnecessary. I suspect that this is likely to be typical in many graduate programs. In such a climate, it is important for senior professors to create spaces for graduate students to engage in this scholarship. The creation of a course that required thinking about social justice concerns in research, and an imperative to engage in research that was counter hegemonic praxis, provided a license for students to think beyond the methodological constraints of the traditional qualitative and quantitative research methods. Furthermore, it offered some students an extension to their coursework in critical pedagogy, allowing them to link their critical theoretical frameworks and topics with critical research designs and methodology.

Creating space is not limited to adding new courses to an existing structure of traditional offerings. It also requires the transformation of existing coursework to accommodate the needs of students with justice-oriented agendas. Students must be able to see a consistent and systematic pathway for the development of their scholarly praxis, and this has been central to my own role as an advisor. Also central to supporting students' work in social justice is our ability to build coalitions among like-minded faculty. Forging these networks ourselves with colleagues across the university and the profession is a precursor to then introducing our students to a broader support system beyond the confines of a program.

Engage Persuasively with Colleagues

As suggested previously, work in the critical paradigm and especially research that is oriented toward social justice is typically marginalized within many colleges of education. Variously labeled "biased," "advocacy," and distinctly "not research" to the extent that reviewers on our university's institutional review board have begun to think about classifying this work as "quality improvement" projects as opposed to "research," a social justice research agenda baffles the traditional researcher. It is likely that the first leadership action of those of us interested in social justice research is to engage persuasively with our colleagues on why and how this work should no longer be deemed marginal but should be considered integral to a college's research vision.

Yet, the process for such discussions must exemplify the communication skills of social justice praxis. Leadership within this context embodies the building of consensus and coalition through the establishment of common ground. The movement away from the margins should not be a proxy for alternate marginalization. The task of thinking globally and acting locally is pertinent here. As we consider the acts of courage of individuals who have to use their wit and patience to negotiate, reconcile, or coexist with (once) hostile enemies (see http://www.coexistdocumentary.org/coexist; Acquaro & Landesman, 2003; Truth and Reconciliation efforts in South Africa, see http://gbgm-umc.org/nwo/99ja/different.html), we must ask what inroads have we been able to make in the safety of our universities across philosophical borders? If we truly believe that the work we do advances the causes of social justice, shouldn't it be part of our agenda as leaders to make that work more central, more "normal," less strange, and less threatening, with no question of its merit or rigor? And should we also – as social justice researchers – work to be framed as central, not peripheral or marginal, colleagues in the day-to-day operation and decision-making of our programs?

View Research as an Act of Courage

I am a member of the National Association of Multicultural Education (NAME) in the USA. The association's logo is an inverted red triangle derived from the symbolism used by Hitler to identify political dissidents and "wrong thinkers." NAME's deliberate choice of this logo inspires educators to think differently, speak out, and speak truth to power. While this might be dangerous for professors who are not tenured or promoted (although this should not be an excuse), it is particularly important for full professors to take up this challenge. This is especially salient for those of us in states where academic freedom and/or tenure are under attack. In a recent conversation where faculty were explaining the importance of academic freedom and tenure to a state-level decision maker, the question was posed: "What is the controversial research that you do, for which you need this protection?" As I reflected on this question, I realized that I could not name too many colleagues who did "controversial" research, for whom their role as a researcher was an act of courage. And yet, I could name many teachers, several of whom were my own students, for whom every lesson each day was an act of courage, as they defied standardization and accountability pressures to teach to the test, drill and kill, or teach only the test worthy.

How, then, can we ignore the responsibility to be leaders? Why isn't it that more of us are not conducting the kind of research that could free our teachers and students from the bonds of pseudoscience that is currently being rammed down? How might we say that our research is being used in schools to further the cause of social justice? Can oppressed principals, teachers, students, or their families carry our own research into school board meetings to demonstrate "evidence-based practice" that supports equity pedagogy and principles of social justice? And for those of us for whom this is true, why are we still the exception, not the rule in our programs, colleges, and universities?

This chapter has noted that in historical and contemporary contexts, social justice praxis has been exemplified in national and local arenas by ordinary citizens, hotel managers, teachers, and journalists (see also Kennedy Cuomo & Adams, 2000). This chapter draws specific attention to the role of educational researchers in the explicit engagement of a social justice agenda as a facet of their everyday praxis. This chapter was a public challenge and commitment – first to myself, then to my students, then my colleagues, institution, and ultimately to the community of social justice activists around the world – to remain consciously involved and deliberately leading in ordinary and everyday ways to make the work we do as educational researchers on a local basis, matter at a more macro level.

Note

1. This poem is attributed to Haim Ginott and can be found at http://www.facinghistory.org/dear-teacher.

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Chapter 14
Social Justice in Education: Joy in Education and Education for Joy

Morwenna Griffiths

Introduction

This chapter is intended to show why educational leadership is properly characterised as leadership for social justice and, therefore, for joy from learning and joy in learning. I argue that educational leaders should always be mindful of the role that they play in making the world a good place to live, within their institutions of education (be they preschools, schools, colleges, or universities) and then beyond them. I consider that 'a good place to live' is necessarily one which is characterised by both justice and by joy. To say this is to use a thin concept of justice (Walzer, 1994). That is, I believe that while we can argue about what exactly we understand by 'good', 'justice', and 'joy', there would be broad agreement that a good life is a flourishing, happy one.

In this chapter I summarise my position by thickening the concept of social justice and, in doing so, lose some of the broad agreement. I begin by stating the view that individual well-being is not achieved at the expense of others and, so, more contentiously, that the well-being of the majority is not achieved at the expense of the minority. Further and in brief, I will argue that while English uses a noun, 'social justice', it would be more helpful to think of social justice as a verb. Thus, it is always an attempt to act in ways which make the world a good place to live and in which good lives are lived. But such attempts are always made in the knowledge that all understanding and actions are founded on imperfect, provisional judgements made in specific contexts of learning and diversity. These judgements are difficult precisely because they require attention to a number of related principles while remaining mindful of how social contexts are always in a state of change. In these circumstances the comforts of certainty are not available. This brief summary has,

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so far, been written in abstract, academic terms, based on theoretical principles. However, it is sometimes helpful to translate these abstractions into slogans, all using verbs:

> Start where you (you all, we all) are. Do what you (you all, we all) can for the best. Be happy. Be careful of other people's happiness. Enjoy the good times. Roll with the bad times. Keep an open mind and keep learning. Keep on, because it matters.

In order to explain my conclusions about educational social justice, I have constructed a kind of critical, philosophical autoethnography. It helps to show how I have come to my current understanding of social justice, as a result of nearly 40 years in education as a teacher, leader and researcher. Over that time, my understanding of social justice has developed considerably. It is, I now believe, an irreducibly complex concept. Smooth, simple formulations have their place, but only if they are continually brought into contact with the uneven awkwardness of the changing contexts of real classes, schools, colleges and universities.

In the next section of the chapter, I explain what I mean by a critical, philosophical autoethnography. I go on to construct one in the following section using examples from my own experience to illuminate and interrogate ideas and practices. Finally, in the concluding section, I draw together the different strands into a very general overview of what I hope is a practical, theoretically informed, approach to social justice for educational leaders.

Critical Philosophical Autoethnography: A Question of Method

I use the term 'autoethnography' because it gestures in the direction of the methodology I want to use. It is a term which covers a family of research approaches which use personal narrative to illuminate or interrogate personal experiences within a framework of social or cultural theory. The different approaches within the family all seek to reinstate the particular within a generalising tendency in academic research towards increasingly (Burdell & Swadener, 1999, p. 22):

> "hyper-theoretical" writing [which] has been criticized for having the effect of disconnecting the experiences and daily lives of those to whom the authors would give "voice." A lack of accessibility in some of these texts has been described as perpetuating a colonizing or "othering" discourse that serves to separate theory from classroom praxis.

Autoethnography is also part of a movement which challenges the assumption that educational research should be like research in the earth sciences and so share identical concerns over validity, objectivity and generalisability. Most autoethnographic approaches emphasise the significance of reflexivity. Reflexivity gives readers information to help them make judgements about the writer's positionality and truthfulness (in terms of both sincerity and accuracy). (Some of these issues of validity, truth and reflexivity are explored further in Griffiths and Macleod, 2008.) My own approach in this chapter shares both these features, reinstating the both particular, and reflexivity. I am keen to connect everyday experiences to philosophical abstractions about social justice; I am also trying to give you, the reader, enough material for you to evaluate my judgements about the events I describe.

Autoethnographers share a concern to provoke change, to move their readers to action. However, there are family differences in how far this concern is foremost and in how far that change should be political: that is, change related to power, equality and voice. I have used the term 'critical' to align myself to approaches that have an intention to provoke political change. Further, I align myself with Denzin (2006) who argues passionately for autoethnography which is 'folded into' critical pedagogy and which 'challenges, contests, or endorses the official, hegemonic ways of seeing and representing the other' (p. 422). My autoethnography folds into my educative practices and into an intention to work for social justice.

Probably the most widely recognised family difference is between analytic autoethnography and evocative autoethnography. The former is most concerned to improve understanding of social phenomena, within the tradition of Wright Mills' notion of the sociological imagination which seeks to understand the links between private troubles and public issues (Anderson, 2006). The latter is most concerned to evoke emotional responses in the audience with the intention of moving the audience to action (Jones, 2005). However, my intentions here are not quite of either of these. I have signalled this by using the term 'philosophical'. I use an autoethnographic approach in order to interrogate educational practices in relation to social justice but also to have those practices interrogate current philosophical concepts of social justice. This is an exercise in a practical philosophy of education (Griffiths, 2003) rather than in social science or in the arts of literature, performance or other evocations of a life. It is intended to explain the theoretical complexities of social justice as they interrelate with the practical concerns of leading, teaching and researching. It should also show why I think these three terms are always connected, though they remain analytically separable.

Constructing a personal narrative of conceptual development is a valuable exercise. It is all too easy to abstract ideas from the particular contexts in which new understandings were provoked, leaving them easily misunderstood by other educators whose contexts may be very different. It is all too easy to assume that we know what abstractions signify, at least until we try to work cooperatively using them. In relation to social justice, in particular, central concepts such as equality, freedom, power and voice are all 'hurrah' concepts; that is, they are espoused by most people – who often do not realise how profoundly they may differ in how they understand any of these terms.

I have chosen to construct my narratives as autoethnography rather than as autobiography. There would be an autobiographical, linear story to be told. My understanding and practices have developed – and continue to develop – over the whole of my career in education, from my very first experiences of teaching as an untrained, volunteer school-leaver in an inner-city primary school to my current position as Chair of Classroom Learning at Edinburgh university: still thinking, still puzzled, still making mistakes, still learning. However, it would be difficult to avoid the usual genres of autobiography in which the narrator is the hero (or antihero) of the story.

So it would be difficult not to tell an autobiography of heroic success or of heroic failure, and in doing so, to highlight my own agency rather than contexts and structures. Perhaps in an attempt to avoid those possibilities, I could tell a story of gathering ideas as I meandered about in a series of responses to the situations in which I found myself. However, this would have the opposite problem in that it would highlight contexts and structures rather than agency. The attempt to overcome these problems might be worthwhile if the interaction of my own agency and structure were my primary concern. However, my interest is more in the details of the specific events which led me to rethink.

Expanding Understanding, Changing Practice

In this section I use my own remembered experiences to show and then reflect on my own developing understanding. To begin, I give a brief outline of my career so that these events are put into historical and institutional context. I then go on to write three personal narratives drawn from different stages in my working life as a leader, researcher and teacher. Each narrative is focused on a theme which I now consider significant in understanding social justice. I have taken care not to recount them in the chronological order they occurred, partly to emphasise that this is not an autobiography.

Brief Outline of My Life in Education

My career in education has been characterised by many moves of institution, town and country, first as a pupil and then as a teacher. As a teacher I moved not only between institutions, towns and countries but also across age-phase, responsibilities and focus of teaching. I was a British colonial child growing up in the last few years of Empire. I lived my first 10 years in East Africa where I attended a boarding school (all white) children, from age 7. My secondary education was in England, first at boarding school, and then, in a new school, as a day pupil; in both cases they were middle-class, largely selective, girls' schools with good academic reputations. In a gap year before university, I spent some months volunteering in an infant school (ages 5–7) in a working class, poor area of an inner city in the English Midlands, where there was a high proportion of recent immigrants from the Caribbean and from the Indian subcontinent.

After university and after obtaining a teaching certificate, I taught for 2 years in a suburban, mostly white, junior school (ages 7–11) and then moved to an inner-city school in the same town, in an area much like the one where I had volunteered – except that by now Caribbean and Asian children were more likely to be the children of immigrants than immigrants themselves. I then spent nearly 2 years teaching English at a university in Iran. When I returned to Britain, I went back into full-time education, studying first for a Master's and then for a PhD.

As a result, I was appointed to what was the first of a number of positions in Education Faculties in various institutions of Higher Education: a College and four different universities. During this time I continued to keep contact with schools, sometimes working alongside a class teacher, sometimes as a tutor for initial teacher education students on placement in school, sometimes in the course of various research projects. At the same time, I was expanding my academic interests. The Masters and PhD were in philosophy of education, and I helped to set up the British Society for Women in Philosophy. As well as philosophy, though drawing on it, I carried out some survey work on gender and computers in primary schools, became committed to reflective practice (sometimes describable as action research, sometimes self-study, sometimes participative enquiry) and experimented with visual and arts-based methods of enquiry. Naturally, as an academic in university, I have taught throughout that time, on a range of courses, both undergraduate and postgraduate, and have had the pleasure of supervising a number of doctoral students. I have also taken on various leadership roles, in relation to co-coordinating teams of colleagues on large courses, to promoting social justice in the institution and to supporting colleagues in their research.

The brief summary of my working life in education will serve as a backdrop to my reflections on my growing understanding of social justice and of how it affected – and was affected by – my practical actions as a leader, researcher and teacher. I present below three autoethnographic reflections, under the broad themes of (1) the sites in which social justice (or injustice) is particularly salient, (2) practical philosophy as a research endeavour which tries to bring philosophical abstractions into conversation with everyday practicalities and (3) the point of education.

Leading on Social Justice: Creating Alliances Across Sites of (In)Justice

My first reflection deals with leadership. It is focused on the question of what is at stake in issues of justice. In such a widely valued, deeply contested and complex matter, where should attention be focused and how should priorities be established?

The title of my new job was 'Lecturer in Equal Opportunities'. Lucky me, I thought. The subject was one I was more than happy to develop, given my then current self-identification as a socialist feminist. The professors in the university would be supportive: the most senior of them had created the new post, precisely because of his commitment to the area. Another of them was somebody I had known and liked since the time I had studied for my postgraduate teaching certificate. The rest of the staff seemed friendly and welcoming. Reality, I soon saw, was much more complex. 'Lucky me', indeed, but lucky because I was enabled to understand some of the tricky, insidious workings of injustice and also to be in a position to do something about them.

When I arrived in the new job, I thought I knew what 'equal opportunities' meant. I soon discovered that it was one of those phrases that shift, shrink and expand depending on who was using it and for what purposes. I thought it meant attention to gender, race, sexuality, special needs and social class. As I started my new job, I found my understanding was fine, as far as it went, but it soon became clear that such a view was too narrow.

The realisation grew that ‘equal opportunities’ was a contested concept in this university. Worse, the term could be misleading and often was. On the one hand I found when I spoke to my new colleagues that they oversimplified it, assuming I meant just ‘gender’ or ‘race’ – but less often, ‘social class’ or, very occasionally, ‘sexuality’. Even those who did not jump to such conclusions tended to privilege one of these groups over another (as did much educational and social theory at the time). On the other hand, these very broad distinctions were inadequate to describe the injustices which my new colleagues perceived, especially those they felt personally. These injustices, I found, underlay the apparently happy, consensual surface I had seen when I first arrived. I heard about them in a number of ways, one of which I recount next.

A dozen of the women in the Faculty responded to my invitation to a ‘women and lunch’ meeting. We sat around tables in one of the teaching rooms, with our sandwiches. It took a little time for the conversation to start the only agenda was to see what, if anything, might come of meeting like this, which would be of relevance to equal opportunities or to ‘social justice’ as I was beginning to call it. Moreover, it was probably the first time that academic and support staff had attended a meeting as equals. It was this situation that provided a topic for discussion. We uncovered some of the many ways that university structures divided us by status and role. To our joint wonderment, we uncovered the many rules the library used to determine which of the university staff could borrow how many books and for how long. It mattered whether you were support or academic staff. Why, we wondered, did the university want to ensure that support staff find use of the books in the library more difficult? It mattered whether you were permanent or temporary, full time or temporary, and what your pay grade was. All of this discrimination was in place for all library use, not just for books in constant demand.

Our joint amazement at the fine structure of categorisation led into a discussion of what issues of justice most concerned us. It became clear that there was plenty lurking below that happy, consensual surface that I had seen when I first arrived. One topic that arose very quickly was sexual harassment. It was first raised by members of the support staff. The academic women, too, had some related concerns, mostly focused on inappropriate sexist remarks. But they seemed to be less aware of larger problems of harassment. When I first arrived, I had wondered if such problems existed in this university, having previously had to deal with the problem of male staff making approaches to students. My question at an induction meeting to the academic responsible for research students had been met with puzzlement. I had asked what his policy was about harassment in relation to doctoral supervision. He looked at me in bewilderment. ‘Well, I’m against it!’ he said, closing the discussion. The women and lunch meeting showed that there was a culture in which such things were not reported to those in authority. We all understood why not, given the power differentials between research supervisors and their doctoral students. However, among the support staff, it was common knowledge exactly which academics had wandering hands and the dilemmas faced by all those – students, support staff or junior academics – who found the hands unwelcome. Some of the perpetrators were senior, well-respected academics.

It was clear that 'social justice' was indeed a better term than 'equal opportunities'. Concepts of opportunity, and even equality, are too narrow to catch the wrongs described during that lunch. It was also clear that terms like gender or social class were far too broad to be helpful in the particular circumstances of this university staff. The discriminations employed by the library demonstrated this, as did the differential knowledge of harassment between support staff and academic staff. Yes, we had used gender as an organising factor but in doing so had uncovered the significance of the many articulations of gender depending on other differences.

Of course we tried to take action as a result of the meeting. We tried to raise the issue and tried to put a proper policy into place. Our attempts ran up against a further problem. It was entirely foreseeable – in hindsight anyway. In general, most people were deeply concerned about injustices they felt inflicted on themselves. They were happy enough to give some support to initiatives to prevent injustices to others, elsewhere. They were reluctant to acknowledge their own part – however unintentional – in creating structures or acting in ways that were unjust. They were deeply resistant to acknowledging their own collusion in maintaining injustices which benefited them personally. Few senior members of Faculty provided an exception to these generalities. Moreover, they had more to lose because of the way structures are operated to benefit those with more power, power which they could – and often did – deploy to their own advantage.

Those who had been so pleased to create my position and who had welcomed me began to find me awkward: difficult, obstructive, a nuisance. One of them described me (to a mutual friend) with exasperation: 'Every time I try to do something, she says, "But that is not democratic".' With hindsight, this situation was not a bad one. Ironically, the focus on me as the main agent facilitated strategies to address injustices such as harassment. Yes, I felt very uncomfortable. Sometimes I had sleepless nights. Sometimes I even wept. But there were substantial compensations. I found common cause with some members of the Faculty, and these alliances sustained me. Most significantly, I knew that my visibility reduced their visibility.

A kind of invisible community was created which occasionally surfaced, sometimes to good effect. We learnt to communicate across differences and our new knowledge sometimes meant we could outmanoeuvre opposition or sometimes simply get things done without provoking disagreement. It also meant that we could give encouragement and support for anyone who wanted to deal with their own projects for justice in the Faculty. One secretary developed a clever, devious plan to persuade finance to install deaf loops and an expensive lift, although at that time these measures were not thought to be spending priorities. An academic member of the staff became able to make issues of gay and lesbian sexuality more openly discussed in teaching all our courses from undergraduate to postgraduate levels. When a new senior member of staff was appointed who seemed to be sympathetic to our concerns, the alliances in place made it easier first to identify him as sympathetic and then to inform him of how he could help.

Researching Social Justice for Leadership: Practical Philosophy

My second reflection deals with research. It focuses on how theorising and practising social justice can become better interrelated to the benefit of both. It is important to note that I do not identify theorising with academics and practice with teachers, policy makers or educational advisors. I assume that academics and practitioners both theorise and practise.

The room was beautiful, well proportioned and attractively furnished. The 12 of us sat round the polished wood table. The big windows looked out on the sunny campus, with its lawns and big trees. The leaves were the fresh green of late spring. Coffee and biscuits circulated. In the week this lovely building was the place where academic staff could relax over lunch or drinks. We were there, that weekend, as a group of mostly middle-level educational leaders from schools and advisory bodies, all of us with a commitment to finding ways to improve education for the dispossessed, in policy and practices as well as by talking and theorising. I felt a subversive pleasure in bringing hands-on educators (so-called practitioners) into the comfortable surroundings reserved for university Faculty (so-called academics).

We had all met as a group just once before, a month or two previously. This group were my collaborators in a project to 'generate a theoretical framework adequate for developing effective practice with regard to improving social justice in education', or so I had put it in my bid for research funds. They included a number of heads and deputy heads from nursery, primary and secondary schools who came from a range of ethnic heritages. They were all British, born in Britain but were variously of African Caribbean, Eastern European and English heritage. There were an equal number of advisors from organisations with an interest in social justice/equal opportunities: the educational psychology service, the race relations council, gay/lesbian rights and a manager in the school effectiveness service of a Local Education Authority. We certainly did not have a consensus about social justice or equal opportunities. On the contrary, we had a range of different, sometimes clashing positions. One of them, for instance, disliked the very term 'social justice', for the good reason that she thought:

> It is a soft option. As we move on in society people try to bring in different terms…People see it as more acceptable. But, in using 'social justice', people forget race.

Yet somehow, in spite of such heartfelt disagreements, the discussion felt comfortable. It was energetic, even impassioned on occasion, but never awkward. Or so I remember it. Certainly the excellent lunches we had at both meetings were very convivial.

The discussions were hugely challenging for me intellectually. I had thought, probably naively, that we would have the sort of theoretically based seminar I was used to participating in or leading. I had assumed that we would, between us, co-construct a theory of social justice which would be informed by my colleagues' joint extensive experiences of dealing with a range of social injustices in educational settings (gender, race, sexuality, special needs and social class). I had outlined the process in the research bid. I had proposed spending a few months on developing my some ideas of my own, based on my readings in philosophy, social theory and education. I would then ask each of the participants how their own interest in all this had developed (partly to see what they included in ‘all this’), how they dealt with it, professionally and personally, and whether they had a view of the significance of social justice in education for our society as a whole. I would transcribe what they had said and then attempt to mirror their views back to them, at the same time engaging and sometimes arguing with them, challenging both them and me to rethink our views. All that had been in writing. Thus, they had had a chance to articulate their personal theories before meeting. My job then was to rough out a first draft theory which we would all refine.

The discussion was not much like a seminar. It was not focused on details of concepts, nor did we end up with a tidy model or theory, as I had hoped. As I came to understand, the tidiness of model was less important than its usefulness in all the many complexities of the different educational settings in which my colleagues worked. The conversation was indeed based on yet another iteration of my attempt to draw together our joint understandings into a kind of framework which would be relevant for senior managers in schools. However, my colleagues preferred to talk about actions rather than to deconstruct and reconstruct theory. We were all focused on practicalities and we were all thinking hard using reasons, evidence and examples. However, they, with their practical focus, were in the habit of acting while thinking about the actions, while I, with my academic focus, was more likely to be thinking while acting on my thinking. I would emphasise here that this difference was only one of our different roles in these circumstances. The group included two other professional academics, and as I have shown in other parts of this chapter, my own focus is not always primarily on theorising.

For me the process worked well. I discovered that rather than a neat model or theoretical framework, social justice was something dynamic, never finished, always a matter of making judgements based on sometimes competing principles and always dependent on a wise appreciation of the full context. I wondered, however, if the others had found their participation had been significant. So 2 years later I contacted them all again and asked. The result was interesting and I learnt from it. For me, it was the end point which was the most significant part of the process. The rest of it – the beautiful room, the lovely lunches, the coffee – was just a small gesture of reciprocation. In the dry language of the research bid, it was merely ‘hospitality for a day seminar’. I was right in one sense. The outcome – the model – was important.

The outcome was not all that was important. I had missed a significant feature about the worth of the process, as I came to realise. To my surprise and initial consternation, my research collaborators remembered aspects of the process at least as clearly as they remembered any outcomes. It was clear that there was still a general agreement with the principles we had jointly devised. Some remembered specific details of the discussion. But, as the excerpts from the transcripts of those later interviews show, they also remembered, sometimes vividly, the processes of reaching the principles. They talked with appreciation about the place, the food, the company, the conduct of discussions and the shared commitment:

> A big window we were sitting in a room and talking to each other. A really lovely window. (Prakash)
>
> I do remember a really nice lunch we had with strawberries. (Carol)
>
> I remember…really enjoying listening… Because everyone was coming from different directions. That was quite remarkable. It felt like a learning experience. I think everybody there was learning. (Sue)
>
> Well, one of the things it shows me is that, unlike what the average person in the street would think, that there were a lot of people who look at the areas of the not so favourable in society, and would love to do something about it. Which is empowering in a sense. (Syble)

I had thought the initial interviews were merely a starting point, but they also seemed to have been significant:

> There's one aspect where discussions were supporting me in tracking where I'd come from, and perhaps why particular issues were important to me. I think that made quite an impact in terms of recognising that, perhaps a bit more explicitly than I had done before. (Nada)
>
> Basically, what I remember about it, it gave me a chance to reflect on where I had come from. Particularly that initial interview you did with me, when I talked about all sorts of things in my background which I was aware of, but it clarified for me why I thought what I did about certain things. (David)

I was astonished by this appreciation of the opportunity to articulate a position. After all, I had chosen my collaborators partly and precisely because they were influential, articulate people. I had thought that the chance to express their views to me would be nothing special.

My surprise and consternation were useful. I was motivated to reassess what we had been doing during that research project. The enjoyment of the occasions was memorable. The affirmation of belonging to a network of people with similar broad ideals was significant. Participants had wanted to tell their stories to a listener who would pay attention. It could simply be that we were all people working in contexts where we were trying to deal with injustice, often feeling isolated and always feeling that there was so much more to do that it is impossible to let up. I am sure much of that was true. However, I now think there were at least two aspects of social justice that had been missed. Firstly, making the process enjoyable, we had been enacting social justice even while we were discussing how to deal with social injustice. Social justice is about finding ways to live well, to have good lives. Secondly, I realised that we had not sufficiently emphasised provisionality. Its significance was brought home to me as I was impelled to use my consternation to rethink what had happened and to reconsider what I thought I knew.

Teaching: What Is the Point of It All?

My third and last reflection deals with teaching. It is focused on the question of the point of education. Why should anyone think that teaching is a worthwhile endeavour? What rationale can be given to students who do not want to learn what formal education offers them? These questions become especially pressing when the class rejects what the teacher offers.

Who would have thought it was so hard to control a class full of 9-year-olds? After all, I had already taught for 2 years, and had, I thought, learnt the basics. The 9-year-olds at the suburban school I had just left had been much easier. It is not as if I was a teacher who required calm, quiet order all the time or, contrariwise, who expected to work in a continual noise and bustle. I still remember, with pleasure, times of both stillness and bustle at that suburban school. There was the time I was reading the chapter in *The Hobbit* in which Bilbo is about to challenge the jewel-studded dragon. From the children came not a whisper, not a fidget, not a rustle, only absorbed stillness. (Their silence was somehow enhanced by the scuffling of the two guinea pigs in their cage in the corner.) Equally, there was the time when the class purposefully but noisily made a mural half the size of one wall of the classroom. It was created using paint and collage and depicted Marco Polo's journey to China. We were all proud of it. Neither of these happy activities was possible in my new class in the inner city.

Fair enough, this class had had an extraordinarily disrupted school life. Builders had been in the school for several years, first taking walls out and then putting them back in. It was unfortunate for the children that their early school careers had coincided with a short-lived fashion for open-plan classrooms. Teachers had come and gone too, often in the middle of a school year. The class had a reputation as being a particularly difficult one, in a school full of difficult classes. I had no intention of going – but what was I to do if I stayed?

I was determined that the children would learn something worthwhile. I was sure that I wanted to be a teacher. I was not a social worker or a play leader. Nor was I willing to act as an expensive childminder for the government. I wanted them to learn – to become fully engaged with – those matters which I was sure were worthwhile: literacy, mathematics, an appreciation of science and the arts, a love of stories. I thought my job was basically one focused on the intellect and the pleasures of the intellect. I tried all the usual tricks of the trade. I was well prepared, had clear expectations about behaviour, praised good behaviour whenever I saw it and so on.

The class and I soon became locked in a pointless game in which I tried to assert my authority while they experimented to see how far they could flout it. Even the few children who were plainly keen to learn did not stand a chance of getting enough of my attention and made little progress. My attention was fully focused on trying to maintain some sort of order.

Happily, by the end of the year, I was sorry when they left my class. And yes, I think that some children, at least, had made progress in all those worthwhile matters I wanted them all to learn. I hope so. I, myself had made progress. I learnt a great deal about education and about myself as a member of a school community. I knew at the time that I had learnt a lot but it has taken years to understand that entirely commonplace scenario of a young, inexperienced, enthusiastic teacher learning to develop a working pedagogical relationship with her class of disaffected students and what helped her achieve it.

The reasons that a working, pedagogical relationship was achieved were, and are, instructive. The ones obvious to me at the time were about my agency. They concerned my decisions and reactions. For instance, about a month into the school year, when I and the class had become locked into struggle, I was blessed with the idea of telling them it was my birthday and presenting each one of them with a small bar of chocolate to celebrate it. It felt like a turning point. It was then, it seemed to me, that we began, very slowly, to develop a working relationship. Was it that they began to see me as more than just another authority figure sent to bother them? Was it perhaps that I had begun to make the relationship into a more human one by drawing on the deep, social meanings of sharing food? A little while later I organised the first of various trips out of the classroom to the grounds of a grand house on the outskirts of the city. The children had space and permission to run and shout. They were taken through the woodlands by an engaging and knowledgeable guide who understood what might captivate 9-year-olds. I was able to have some quiet talks with the less boisterous children. When we got back to class, the children rewarded me by completing some careful writing about the trip. 'We did see some bluebells and they did stink' was one memorable offering from an able boy whose education had, so far, failed him badly and who spent most of his time acting out his frustrations. It was his first tentative step to a level of literacy he should have reached long before.

We built on all of this as a class. We went on more trips. Sometimes this was as a whole class. We went to a museum, we took a train trip to the next town (with screams as it went through a tunnel) and we joined a multi-class trip to the seaside. Sometimes the expeditions were of small groups who had been members of the after-school clubs I had set up. The five children in the music club went with me (and four of my friends) to hear Prokoviev's *Peter and the Wolf* at the city concert hall. It was their first ever visit to such a place. They stood out, of course. There were no other black children in the audience. In school, I went on paying attention to them not only as developing intellects but as whole persons – bodies, minds, hearts and spirits – and they began to study and learn. I bought cushions for the classroom, for instance, and walked home with any who invited me, to say hello to their parents.

My agency was obvious to me. What I did not notice then were some of the other factors that enabled what success there was. Yes, the school was a difficult one. That was well known and obvious. Less obvious was the way my efforts to learn were supported by the other teachers. Their wisdom and kindness must have been crucial, even if I took it for granted at the time. As significant was the willingness of the local parents to respond to my inexpert efforts to involve them. In general, my efforts in the classroom were supported by the wider educational relationships already established with and through the school community as a whole. Moreover of course the sociological and political context of the time had its effect. It is worth remembering that all this was taking place in a not atypical, inner-city, school in 1970s England, just beginning to move from an assimilation approach to immigration and ethnicity towards considering integration and multiculturalism. Also, Britain was just moving out of the period of overall upward social mobility in the 1960s, and it was in the very early stages of second wave feminism.

So what was the point of all that effort? At the time I thought it was the achievement of some worthwhile learning including not only what was needed instrumentally (such as functional literacy and numeracy) but also the riches of books, mathematics and the rest of the curriculum. I also saw that part of the point was bound up with the significance of relationships with the children beyond the strictly teacherly but always teacherly. In other words I had been right that the pedagogical relationship is one of learning – but not entirely right. It is also one characterised by mutual respect, of the kind that I think I demonstrated partly by my commitment and recognition of the children's full humanity, partly by showing my own full humanity – a person with birthdays, who had a life beyond the classroom, who took a pleasure in museums, train rides, classical music and the seaside. This understanding of mine developed later into my current view which is that learning is a facet of a rich, worthwhile good life while also always being a useful tool to obtain other facets of that good life. Therefore, it is not just contingently connected to personal and community relationships and ways of living but logically interconnected with them. The point of education, then, is nothing less than the co-construction and maintenance of a good life for each and every one of us.

Practical Theory

Reflections on the Themes: A Growing Web of Theory

In this section I reflect on how the narratives contribute to the growing web of theory which makes up my current understanding of social justice in education. Between them the reflections cover only about 8 years – maybe about a fifth of my working life as a professional educator. My aim has not been to trace all the roots of the ideas that feature in my current understanding of social justice, only the development of some of them, in specific complex episodes. I consider how my ideas are grounded in experience: how my current understanding of what constitutes social justice springs from – but also contributes to – my practices of leadership, research and teaching. However, it has not sprung fully formed from episodes and events like the ones which I have described. It is the early growth that can be discerned there. In that sense, what has been presented might be describable as an exercise in genealogy. However, I prefer to describe the process as autoethnography, because a genealogy is always a descent, while in this case, I have returned to the memories of the events, as I do here, to reassess them. So they have contributed to the development of my thinking about social justice again and again.

I described the exercise as a critical philosophical autoethnography, although, so far, I have not mentioned any philosophy or, indeed, any theory at all. Yet it has been extremely influential. I have taken myself to be trying to follow Arendt's well-known advice (1958, p. 5):

> What I propose is very simple: it is nothing more than to think what we are doing.

As Arendt very well knew, 'simple' does not mean easy. And it is significant that she uses the pronoun 'we', referring to the thinking as well as to the doing. The influence of others, whether through the literature or in person, has been crucial to the evolution of my current understanding. The methodology of philosophical educational research can be described as the (difficult, exciting) process of thinking, while reading, while listening, while talking, while writing, while trying to do something practical. Sometimes one of these of activities dominates but all are vital. To put it another way, each activity is necessary but none is sufficient.

The last 40 years have been intellectually very exciting, as new forms of theorising have engaged with a number of sociopolitical movements of liberation. Educational philosophy and theory has been part of that process. It means that there are now a huge range of theoretical approaches which may inform educational research and practices. The bibliographies in the books and articles I have written over the years show that I draw on a number of different areas: philosophy (including feminist, analytic, postmodern and philosophy of education), social theory (especially theories of difference, most especially feminist theories), personal narrative (including auto/biography, autoethnography, phenomenological accounts), research methodology literature and reflective practice (including action research and self-study). The bibliographies show something of my reading, but not the equally significant discussions, conferences and networks which support and are supported by it. Beyond this, I read both for pleasure (including poetry, fiction, auto/biographies, politics and newspapers) and also to support my teaching or leadership roles. It might be possible to trace what has most influenced me as my ideas developed, by using the reference lists of my publications. For instance, my earlier publications draw largely on feminist philosophers and educational reflective practitioners (Griffiths, 1988; Griffiths and Davies, 1993; Griffiths & Smith, 1989).

A central motivation for me has always been to bring abstract theory into conversation with educational practices (Griffiths, 1995, 2006; Griffiths, Berry, Holt, Naylor, & Weekes, 2006; Griffiths & Tann, 1992). All my theorising has drawn on my experiences in events like the ones that I have described. Sometimes theories helped me to understand what was happening, but just as often they did not match up to what I was experiencing, and this helped me think through my own position more acutely. This can be seen in the account I titled 'Leading on Social Justice: Creating Alliances Across Sites of (In)Justice' attempts to identify what I call 'sites of (in)justice'. As I have already remarked, when I arrived in my new post, I had been much involved in feminist philosophy and theory and believed that large-scale political structures of gender, race, social class and disability were the major features of injustice. I learnt that while these categories remain significant, they are so broad that they always need refining. Firstly, these structures do not exhaust political structures that need naming – and given how political circumstances change, it is impossible ever to create a definitive list. An 'etc.' is needed at the end of a list which must always be understood as provisional. Feminist and antiracist theory helped this rethinking, as differences between women – even the existence of the category 'woman' – became issues of concern (Griffiths, 1995). Secondly, in order to find what is significant in specific circumstances, it is important to listen to others, carefully and with respect, and to be prepared to adapt ideas accordingly (Griffiths, 1997). At that stage I had not read Nancy Fraser's essay on 'recognition' (Fraser, 1997), but it was noticeable that giving respect to people seemed to help in efforts to get them to act collectively. The experience of trying to do that showed me the significance of having a 'public space' which is not universally public (Greene & Griffiths, 2003; Griffiths & Ross, 2008). It also showed me some of the contradictions and compromises that underlie the easy words, 'collaboration' and 'partnership' (Griffiths, 2000), and it was then I first began to try and theorise them. At the same time, I noticed how that kind of public space was often characterised by enjoyable acts of subversion and transgression. I have enjoyed turning that experience into an inaugural lecture and then academic articles on why naughtiness – playfulness, mischievousness – is so often necessary when working for social justice (Griffiths, 2007; Griffiths & Peters, 2012).

My interest in connecting philosophical abstractions with the everyday was key to the processes described in the account titled 'practical philosophy', which is the phrase that I used to describe the idea later on (Griffiths, 2003). Indeed, the way I had conceptualised the research I describe came about precisely because of my efforts to match widely used theories of justice with the dilemmas faced by educators. As I stated in the research bid:

> Decisions about education are, inescapably, also decisions about social justice. A new theoretical framework for effective practice is urgently needed because the old frameworks no longer serve, (a) Existing frameworks have been seriously questioned by postmodernists, poststructuralists and commutarians. (b) Even if existing frameworks successfully resist such attacks, they have been based on considerations of welfare, and do not easily apply to education.

The research was also strongly influenced by my continuing interest in reflective practice, understood as a continuing iteration of thinking and action (Cotton & Griffiths, 2007; Griffiths, 2009; Griffiths & Woolf, 2009). My view that a new kind of framework was needed was reinforced by the research. I argued that an alternative was needed to overarching theories, whether they were like the elegant formulation by Rawls (1971) or the complex irony of Plato's *Republic* (Plato). I proposed a more postmodern alternative, arguing that it was already imminent in the discourses of education (Griffiths, 1998a) and that it could be understood as a set of principles to guide the judgements of educators (Griffiths, 1998b). My argument relies not only on an acceptance of all understanding as being provisional but also on a readiness to rethink by encouraging dialogue with others – in all their personal, social and political differences (Griffiths, Bass, Johnston, & Perselli, 2004). In my reflection I describe my discomfort when the interviews with my research colleagues took an unexpected turn. Encounters at conferences led to my being able to use that discomfort to re-theorise social justice, using the concept of 'little stories' (Griffiths 2002, 2003) and also drawing on debates then current, about the concepts of voice and empowerment (2003). These ideas all contributed to an argument for a dynamic model of social justice, which included disruptive, dissenting voices as a way of emphasising its imperfection and provisionality and also as way of instantiating respect for and engagement with the perspectives of others in all their lovely diversity (Griffiths, 2003). Many of these ideas were a development of my earlier thinking about auto/biography and the relationship between an 'I' and a 'we' (Griffiths, 1995). At that time I had been taken myself to be developing a feminist theory of the self. I had not thought I was concerned with promoting educational social justice, even though at the time I was thinking and publishing on it (Griffiths & Davies, 1993, 1995; Griffiths & Troyna, 1995).

My last reflection, 'What is the point of it all?', goes back to the start of my career, yet it is relevant to thinking further about another set of themes which I have been working for the last few years. My current focus on the delights and joys of teaching and learning has led me to return to my experiences of teaching throughout my career, from its very beginning. At the same time I have been engaging with a number of other ideas, drawn from experiences not presented in this chapter. The focus developed as I noticed the mismatch between much of the discourse of education and experiences of it. On the one hand, there is a proper anger among many educators about an increasing instrumentalism and managerialism in educational policies, together with a continuing pressing need to draw attention to the many injustices perpetrated both in and as a result of the institutions of education. On the other hand, it is clear that involvement in teaching and learning is routinely felt as enjoyable, worthwhile, energising and even delightful. At least that is what I have noticed in all the institutions of education where I have worked. I have also noticed how such experiences within education in the arts can enhance social justice (Griffiths et al., 2006; Griffiths & Ross, 2008; Griffiths & Woolf, 2009). As I thought further about this, I was able to start theorising about the fundamental connections between social justice and a good life found in philosophers as diverse as Plato, Aristotle, Rawls and Lyotard. The concept of a good life is of a life which includes occasions of joy, delight, happiness and well-being. As Robin Richardson put it (1996, p. 20):

> Not that justice is an end in itself. Its purpose is to make the world safer for hope, love and rejoicing. Justice and joy: each is the ground and the fruit of the other.

My own experiences as a teacher illuminated my thinking. In my reflections I noted that social justice is grounded in happy, if difficult, personal and community relationships; similarly my account shows, I think that the same is true for the classroom: that 'education for all', as social justice demands, is grounded in the kinds of personal and community relations that sustain learners and teachers alike, as they create a good life together (Griffiths, 2012).

Social Justice for Leaders

I have moved a long way from what I see now as the simplicity of my early thinking. Over the years, as I have understood the issues in greater complexity, I have tried to find ways of encapsulating them in a way that could move others to act on them. This endeavour has been made even more difficult by the provisionality at the heart of the theory. This provisionality is, I now see, always going to be present not only because contexts change and understanding grows but also because of 'natality', as Arendt calls it (1958, 1968). She is referring to the way that each human being brings newness into the public world and so may affect our collective actions.

However, if the point is to both inform and move others to work for social justice, then a way has to be found to explain what can be done. If the model of social justice is a dynamic one – if social justice is a verb – then it has to be made clear enough not only to show why actions are needed but also *what* actions might be taken. Further, while it would be misleading to make it seem that it is only a simple matter of following a few guidelines, it would be counterproductive to make it seem so difficult as to inhibit the attempt.

In this last section I outline one possible approach, using the metaphor of a forest. Like social justice, the different parts of a forest are distinct, though still recognisably part of the same forest. Equally, while still being the 'same' forest, it is always changing and always growing. New species are introduced from time to time. The climate may change. The question facing any leader is how to introduce people to the forest and then encourage them to live there.

One way of introducing the forest is to fly over it or to watch a film summarising its main features. Seeing the whole broad picture of the social justice forest may well be a good start. The introduction can be made very simple indeed, as the slogans in the introduction show. However, a good place to start is a bad place to end. In order to understand the social justice forest and live in it, it is necessary to enter it and deal with its complexity. Progress can be made by encouraging some understanding of the range of concepts which are relevant, including not only diversities, equality and fairness but also voice and empowerment, and then remembering some of the many sociopolitical-cultural reasons for diversity and discrimination. Further, it may be helpful to consider the ways in which (in)justice manifests itself, especially locally, in terms of distribution and recognition (Fraser, 1997) and association (Gewirtz 1998, 2006; Young, 2000). With that basic understanding, it will become possible to explore the kinds of dynamic connections made in *Fairly Different* between different factors which come together if action is to be taken for social justice: self-esteem, public spaces, action, collaboration and empowerment. In this chapter I have also drawn attention to the relevance of joy, naughtiness, laughter and pedagogical relationships. Which of these are relevant depends on the local context.

Paradoxically, the sheer size of the forest can also be helpful once we have the courage to face it with modesty as well as determination. Knowing that it is impossible to attend to every injustice, let alone to fix them all, can liberate us from trying to do any such thing. The impossibility of finding perfection means that it is acceptable to be wrong as well as right. After all it is only by making mistakes that anyone can learn how to reframe their understanding and values. It may be helpful to exercise what I have called mindfulness by continuing to challenge ourselves using questions which can remind us what our own best purposes are and have become (Griffiths, 2009). We will certainly make mistakes as we find pathways through the trees, but as long as we remember our reasons for being there, we can usually recover from them. It takes courage to admit mistakes. Especially, perhaps, for leaders. However, discovering (and rediscovering) such courage liberates us to learn from our mistakes and so to stay open-minded and wholly alive – to find more, to explore – instead of becoming fearfully closed down and quiescent. Especially so, when we see that there is no need to be solemn or self-sacrificing. On the contrary, enjoyment, satisfaction and laughter along the way only help in the high purpose of constructing a satisfying working life dealing, with justice, with human individuals in all their wonderful complexity.

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Chapter 15
Critical Evocative Portraiture: Feminist Pathways to Social Justice

Linda L. Lyman, Angeliki Lazaridou, and Jane Strachan

In this handbook chapter we have documented the underlying purpose and phases of work involved in turning a research question about women leaders' personal and professional experiences into a book titled *Shaping Social Justice Leadership: Insights of Women Educators Worldwide* (Lyman, Strachan, & Lazaridou, 2012). The book explores how social justice leadership is defined by actions (Bogotch, 2002; Rapp, 2002) and presents evocative portraits of 23 women researchers and educational leaders from around the world whose actions are shaping social justice leadership. Representing 14 countries, these featured members of a research group called *Women Leading Education Across the Continents* (WLE) portray the complexity of twenty-first century leadership in narratives woven from their own words.

In this chapter, our focus is on methodology, specifically how we conducted the research that we are calling *critical evocative portraiture*. We offer this method as another way, a decidedly feminist pathway, to study leadership for social justice. Quoting from one reviewer, Ira Bogotch, "What they (the authors) have done is to marry feminist theories to narrative methods and the result is a new methodological

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genre for studying social justice." And so, to elaborate, in this chapter we (1) summarize the phases involved in transforming a research question into a book, (2) ground the methodology in existing scholarship, (3) clarify how critical evocative portraiture differs from other narrative inquiries, (4) consider feminist pathways to social justice leadership, and (5) reflect on the power of critical evocative portraiture and its effects on us personally and professionally. The book was written to show what social justice leadership looks like in the work of women educational leaders worldwide. The same three coauthors of the book have collaborated on this chapter.

Transforming a Research Question into a Book

At the first international conference of *Women Leading Education Across the Continents* (WLE) in Rome in July 2007, 33 women leaders came together to share papers based on their individual work concerning gender and equity issues associated with opportunities for women to lead and girls' access to education around the world. The group included 22 invited scholars and 10 discussants. The conference convener and host was Helen Sobehart who, at that time, was Associate Provost/Academic Vice-President at Duquesne University in Pittsburgh, Pennsylvania. Having met for two more biennial conferences in 2009 and 2011, WLE is the first ongoing international research group focused on the important topic of women's leadership in education. Today, the membership of WLE also includes several men and numbers around 70 persons from 24 different countries.

The Research Question

At the first conference in 2007, the primary goal, apart from sharing research, was to develop collaborative research teams that would explore questions of common interest across our cultures and countries. A number of topics were identified. One centered on the research question, "*How have the lived experiences of conference participants influenced their lives and their professional/leadership decisions?*" Several women suggested that members of WLE write and share stories about their personal and/or professional lives and so keep in touch and come to know each other better before the next conference.

In late August founding chair Helen Sobehart sent a WLE listserv message asking us to let her know which of the research focus groups interested us. Linda Lyman was the first, and Jane Strachan the second, to express an interest in collecting narratives of the personal and professional journeys of conference participants. Within a day, five others had volunteered: Angeliki Lazaridou (Greece), Anastasia Athanasoula-Reppa (Greece), Esther Sui-chu Ho (Hong Kong-China), Sister Hellen Bandiho (Tanzania), and Pamela Lenz (USA). Following up, in an August 28 listserv message, Helen Sobehart asked Linda to become chair of the Sharing Our Stories research group.

The Participants

In October, unprompted, Alice Merab Kagoda from Uganda sent in her story, which was circulated on the listserv. In response, members of the Sharing Our Stories research group emailed among themselves about how to put out an official "call for stories" and finally decided that the purpose of the project was best served by not asking for a particular structure. Accordingly, using the listserv, on November 5, 2007, they sent out a call for each participant to submit "the story of your personal and/or professional journey in whatever format and with whatever emphasis makes sense and is comfortable for you." The personal narratives submitted began a 5-year research process that led to the writing of *Shaping Social Justice Leadership: Insights of Women Educators Worldwide* and subsequently to this handbook chapter on *critical evocative portraiture*.

Data Gathering and Analysis

The process of transforming the collection of stories into a book was led by Linda Lyman, with the assistance of coauthors Jane Strachan and Angeliki Lazaridou. The data collection and analysis processes that resulted in the book emerged from the first conference in summer 2007 and extended to summer 2012. The process unfolded in four phases.

Phase One: Exploratory Data Analysis and Presentations

The first presentation about the stories, given by Linda Lyman as part of a panel at the October 2008 University Council of Educational Administration (UCEA) Annual Meeting in Orlando, was based on analysis of seven stories received from participants representing six countries. This initial data analysis was conducted using a combination of content analysis and constant comparative methodology (Glaser & Strauss, 1967; Merriam, 2001). Five themes running through the majority of narratives were identified:

1. Life experiences resulted in an awakening to gender and other social justice issues.
2. Childhood challenges included limited financial resources.

3. Balancing career and a family/personal life was an ongoing challenge or struggle.
4. Parents and grandparents supported and encouraged education.
5. At all levels, education for girls was a privilege requiring sacrifice.

The second presentation was delivered at the February 2009 American Association of School Administrators (AASA) National Conference on Education in San Francisco by Helen Sobehart and Linda Lyman. By that time three more stories had been submitted, so this presentation was based on ten stories from seven countries, with the entire data set reanalyzed using the same process. This time six themes were reported. Four of these themes had been identified in the first analysis; one previously identified theme ("At all levels, education for girls was a privilege requiring sacrifice") no longer applied to a majority of cases, and two themes were new. The two new themes were:

1. Education was recognized as an important pathway to an enhanced life.
2. Personal and professional journeys intertwined, involved "leaving home."

Following their AASA presentation, the idea for a book based on the personal narratives was born in a conversation between Helen and Linda when Helen said "I think there is a book in this."

Phase Two: A Keynote Address

After the February 2009 AASA presentation, Linda Lyman was invited to give a keynote based on the stories at the second WLE conference in September 2009 in Augsburg, Germany. Three additional stories were submitted bringing the total to 13. In preparation for the keynote and discussion of a possible book, Linda reanalyzed the data, taking the same approach but this time using the NVivo 8 computer application. She did not include her own narrative in this reanalysis. The 12 stories featured represented 9 countries.

The invited keynote and 89 page supporting paper were titled "Personal and Professional Journeys of Women Leaders: Comparing Places, Passages, and Pathways." The paper began with brief (approximately 600 word) profiles of the 12 who were featured. The regularities and patterns in the data that emerged this time were more complex. Ten themes were identified and organized according to three passages common to women's experiences. This use of the word passage connotes a journey featuring challenge and resulting in growth. Themes presented in Educational Passages were (1) family support, (2) leaving home, (3) financial challenges, and (4) confronting expectations. Themes featured in Career Passages were (5) complexity of place, (6) multiplicity of career paths, and (7) dilemmas in balancing career and family. Themes detailed in Intellectual Passages were (8) facing cultural gender realities, (9) developing gender awareness through education, and (10) experiencing gender issues in careers.

Using illuminating details from the participants' stories, Linda concluded the paper with evidence of four converging pathways among the 12 participants: Scholarship, Introspection, Activism, and Mentoring. These pathways described the ways participants focused and manifested their social justice work in the world. The keynote presentation focused on these pathways, with the 12 women's stories divided equally according to which women best illustrated each of the pathways. The argument developed in the keynote was that the most challenging passages can become pathways, leading to new directions for ourselves and others. The themes of the keynote paper have been presented in this chapter in some detail because they became the foundation from which the book developed. It was the brief profiles in the keynote paper that eventually grew into longer and more detailed (i.e., intimate) portraits of women leaders.

The keynote was given on the first day of the conference. When the research groups met on the final day, the Sharing Our Stories group concluded that the keynote should be developed into book-length format, with Linda leading the research. In a following plenary session, the conference participants concurred and directed Linda to seek IRB approval from her university and begin the research project. The Sharing Our Stories group was renamed "Narrative Illuminations" and the project was officially launched. Linda invited Jane Strachan and subsequently Angeliki Lazaridou to be coauthors—reasoning that a book about women from around the world needed an international team of authors.

Phase Three: Developing the Proposal

Phase Three began in October 2009 with story submissions continuing until June 2010 when actual writing of the proposal began. After the September conference, Jane and Linda exchanged emails about frameworks and ideas. In October, Linda explored ideas with several publishers and found interest in a book which would focus on how to make a difference through social justice leadership, with a strong element of critique but also offering hope and inspiration. In December 2009, Jane and Linda had the opportunity to meet in person in New Zealand to consider possible themes and structures. They decided that the focus would be challenges and accomplishments of women leaders' social justice commitments and actions, including how the women approached and endured given the difficulty of such work. By early spring, Angeliki Lazaridou formally joined the coauthor writing team.

Linda took responsibility for writing the proposal, with regular input from Jane and Angeliki. As additional stories arrived, Linda continued to use NVivo 8 to recode and reanalyze the stories with a focus on how women's experiences contribute to defining social justice. In total, 23 stories were submitted, representing 14 countries—Australia, Brazil, Hong Kong-China, Ghana, Greece, Jamaica, New Zealand, Pakistan, South Africa, Tanzania, Thailand, Uganda, USA, and the United Kingdom. A total of 56 NVivo coded data files resulted from the reanalysis.

The themes detected in the stories suggested that the proposal's nine-chapter framework would be appropriate, with the chapters arranged to progressively develop the thesis that social justice leadership is defined in the actions of individuals. Accordingly major themes were framed and assigned to particular chapters, together with stories that were most representative of facets of these themes. Here, for example, is the proposal description of Chapter 5:

> Chapter 5 – Skillful Authentic Leadership
> In writing about their personal journeys, 21 of the participants commented directly on acquiring or using leadership skills. These insights from the narratives will be shared and the particular applicability of the composite set of their skills/approaches to social justice leadership will be developed. Some participants described what they learned about leadership from their early experiences within their families. Others wrote about things learned through positive and negative experiences as they progressed through education. Still others described on-the-job learning. The themes in their approaches to leadership will be shared along with their advice for other women who would lead for the purpose of advancing social justice. Many offered favorite meaningful quotations that have served to guide their thinking. These also will be shared.
>
> Featured Leaders: Sister Helen Bandiho, Tanzania
> Pamela Lenz, USA
> Rachel McNae, New Zealand
>
> Relevant NVivo Coding = Leadership skills (20); Leadership roles (13); Quotations (11); Power (11); Strength/Strong (16); Single sex schools (8); Father (18); Mother (17); Grandparents (9); Family of origin (8); Family (22); Intellectual passages (18); Spiritual passages (9); School performance (12); Unique circumstances (13); Cultural barriers (10); Support (17); Mentors (9); Motivation/Values (22); Religious influences (9)

Phase Four: The Writing Process

Linda assumed responsibility for developing the proposal and two sample chapters. The three coauthors divided the remaining chapters based on their previous research interests. Linda then sent the thematically relevant NVivo data files to Jane and Angeliki so that each could do additional analysis to crystalize themes and subthemes that they would illustrate using the narratives assigned to their chapters. For example, Angeliki developed three subthemes for Chapter Five—Skillful Authentic Leadership. These subthemes and the leaders whose stories illustrated them were *Growing into Authenticity*, Sister Dr. Hellen Bandiho, Tanzania; *Developing Phronesis* (Practical Wisdom), Dr. Pamela Lenz, United States; and *Leading for Eudaimonia* (Well-Being), Dr. Rachel McNae, New Zealand. The writing process was recursive. The proposal chapter descriptions served as starting points, but new insights emerged as the chapters were written.

For example, the actual Chapter Five introduced "authentic leadership as a root concept of social justice leadership" (Lyman et al., 2012, p. 101), headed by the epigraph "The authentic self is the soul made visible." The portrait of Sister Hellen illustrated *growing into authenticity* and was filled with details of her life "as the second born of eight children to parents who were ‘small-scale farmers’ in an area ‘dominated by hills and valleys’ and surrounded by banana plantations” (p. 104).

> Her father was determined to get his daughters educated, and so at the age of ten, Sister Hellen left home for this boarding school run by the Sisters of St. Therese. She and her father, and all her belongings, got a motorbike ride from the parish pastor, and all three set off to what would be her new home, located about fifteen miles from her village. This turning point event was described by Sister Hellen as “a beginning to a new life” through which she would be able to fulfill her career and life goals. “She never looked back either academically or at the route of life she had decided to take.”(p. 105)

Now a university administrator in Tanzania, Sister Hellen wrote, “There are many paths to the top of the mountain but the view is always the same.… Having arrived where we had dreamed of reaching, we are challenged to pave ways for younger women who may be struggling to make it.… Let us play our part” (p. 108).

When each coauthor finished a chapter, she sent it to the others for feedback and edits. This was a valuable part of the process and strengthened the writing. Through emails and Skype sessions, the coauthors discussed the refinement of subthemes and other writing issues and challenges. Linda continued to serve as the general editor. After each draft chapter had been revised, it was sent to the women who were featured in the chapter for their responses, which could include clarifications, corrections, and suggestions. This process often involved several back and forth emails and ultimately ended when each person profiled in a chapter gave us written permission to publish her story as written in the final draft.

Critical Evocative Portraiture: Grounding the Methodology

We now call our methodology *critical evocative portraiture*, but had no name when we began. Jonathan Janzen, another reviewer, noted that we had not presented “mere stories.” Rather, he wrote, “each narrative is deeply grounded within theory and data that emerge naturally from the life-experiences of those who lead in difficult contexts and, quite often against the grain of an androcentrism afflicting scholarship and practice on education leadership that remains susceptible to corporate models of how to lead.” But what exactly was this narrative method and how did it differ from “narrative interpretation” or “self-narrative interpretation”?

We thought of using “collaborative narrative bricolage,” and that did get at the underlying processes—but what did it mean? Was it accessible enough? According to Denzin and Lincoln (2011), “we are all interpretive *bricoleurs* stuck in the present, working against the past, as we move into a politically charged and challenging future” (p. xiii). The next thought was that we had written “feminist self-narrative portraiture.” However, a difference between our portraits and other examples of self-narratives is that we did not use participants’ complete original self-narratives. Rather we turned their self-narratives into portraits, taking a clearly feminist approach as we portrayed the women in the context of their own lives.

Having introduced the concept of feminism, and discovering the evocative narrative terminology (Ellis & Bochner, 2000), we considered “feminist evocative narratives,” before moving briefly to “feminist evocative portraiture.” Finally, we settled on “critical evocative portraiture,” believing that the term “critical” carried connotations of feminism and was the best description not only of the product we had created, but the process by which we had created it. To offer a preliminary brief summary, when it was time to write the chapters for the book we began with the evocative narratives submitted by the WLE members, gave each chapter a critical frame, and then turned the original narratives into portraits, each with its own critical frame.

Critical

Support for using the term critical in describing a research methodology comes from the work of Elliot Eisner (1998). Eisner defended use of the term criticism in his underlying approaches to seeing intelligently and with feeling in qualitative inquiry and evaluation. He wrote in the introduction to *The Enlightened Eye* (1998), “Criticism suffers from its association with negativism. Unfortunately many people think of negative commentary when they hear or read the word criticism. But this too is not a necessary or intended meaning.… Criticism can be laudatory. Its aim is to illuminate a situation or object so that it can be seen or appreciated” (p. 7). Specifically Eisner further elaborated the importance of critical frames when he wrote, “Criticism is an art of saying useful things about complex and subtle objects and events so that others less sophisticated, or sophisticated in different ways, can see and understand what they did not see and understand before.… In this sense, educational critics and critics of the arts share a common aim: To help others see and understand” (p. 3). He explained that “every act of criticism is a reconstruction” (p. 86).

Eisner highlighted four dimensions of educational criticism to be *description, interpretation, evaluation*, and *thematics* (1998, p. 88). How we structured our work honors each of these dimensions. In each portrait a *description* of the leader’s reality is drawn in visibly accessible language using her words. In placing each portrait within a chapter centered on a particular major theme, we *evaluate* that aspect of the story as meaningful, even though each story could have illustrated several of the major themes. We *interpret* the theme by placing portraits in subtheme sections, each containing insights that can be drawn from the portrait. Finally, the *thematic* structures at the macro level, and within each chapter at micro levels, contribute to its power.

For example, the Chapter Five portrait of Pamela Lenz, USA, illustrates *developing phronesis,* the subtheme. Interpreting and evaluating, the chapter author wrote, “Evidence of Pam’s leading with *phronesis* [practical wisdom] is her awareness of her strengths and weaknesses (intrapersonal intelligence), her confidence in her abilities, and her setting of appropriate goals” (Lyman et al., 2012, p. 114). She is described as an “existentially intelligent person,” who introduces authenticity as the norm of self-identity. Her authenticity is reflected in what she said when asked about her social justice work. Pam responded by referring to Mother Teresa's words:

> When asked about her work, Mother Teresa said, "One thing I have done which I believe is important: I have helped people to talk to the poor and not just about the poor." Pam applied these words to herself, saying: "[I hope] that I don't just talk about social justice issues, but that what I do from one day to the next contributes to improving the lives and understandings of others." (p. 115)

Pam struggles with questions such as "What do I want my legacy to be? Her pursuit of social justice by leading authentically with *phronesis* is a work in progress, 'bringing the unconscious to consciousness, so we intentionally create more equitable opportunities for all'" (p. 113).

To summarize, each chapter introduction clarifies the chapter theme. Each portrait illustrates and develops a facet or aspect (subtheme) of the chapter theme. Each portrait is followed by *Insights* gleaned from the narrative by the chapter author. The final pieces of critical framing guiding readers to view the portraits through scholarly lenses are the *Selected Scholarship* section and then the *Concluding Thoughts* that end each chapter.

Evocative

From the book's launch at the WLE conference in Germany, we had twin purposes—to inform by offering the wisdom of practice and to inspire. Evocative, to call forth, is associated with empathy and feelings of inspiration. The coding of the themes in the narratives, the details presented in the portraits, and the direct quotations from the individual narratives were all choices influenced by the desire to achieve an inspirational purpose. An example of an evocative passage comes from the Chapter Five portrait of Rachael McNae, New Zealand. The subtheme Rachel's story illustrates is *leading for eudaimonia* [well-being]. Her narrative contains vignettes describing important events in her life. Titles of these include: "Wanting ripples but creating waves"; "Is it because we are so good at what we do, that we want to have it all?"; and "Wonderwoman? Or wondering why I am doing this?" As a new academic, wife, and mother, she experiences being pulled in different directions. Having left her son at the nursery school, she describes the tension. "Why did I make these choices? Am I doing the right thing? … What is it that makes me believe that working … is so much more important than caring for my son, teaching my son?" The ending of her narrative captures "important depths in her understanding of leadership's labyrinth:"

> I know envy, I know what it feels like to seek and crave. I know guilt, the weight of a heart, a tear in the eye, and a hand in my hand. I know influence, what not to do. I know a shifting identity. I know experience, privileges, pathways, and what opportunity provides or takes away. (Lyman et al., 2012, p. 120)

Ellis and Bochner (2000) introduced the phrase evocative personal narratives in the context of autoethnography, describing it as a form of reflexive ethnography practiced by social scientists who have recently begun to study themselves. In an in-text "conversation" between the coauthors, Bochner stated about these social scientists that they "write evocative personal narratives specifically focused on their academic as well as their personal lives. Their primary purpose is to understand a self or some aspect of a life lived in a cultural context.… The goal is to write meaningfully and evocatively about topics that matter and may make a difference, to include sensory and emotional experience" (pp. 741–742). Bochner called such personal stories evocative narratives. He focused on their expressive and dialogic goals, in contrast to more traditional social science goals. Other differences include first-person narration, focus on a single case, a storytelling mode, highlighting of emotional text, and others (p. 744). "Evocative stories activate subjectivity and compel emotional response" (p. 744), in summary.

In writing each portrait, we were re-working self-narratives, with similar goals of expressive language. In naming our methodology the word evocative seemed to fit. We wanted the readers to be in dialogue with the texts of each other's lives, to be inspired. Metaphoric language in many of the original narratives added to their evocative quality. We spoke of the power of story and metaphors from the beginning, and we deliberately created a subtext of metaphor—for example, using Bateson's (1989) "composing a life" and others—to reinforce the evocative quality of the narratives as submitted.

Portraiture

Sara Lawrence-Lightfoot and Jessica Davis's (1997) book on the art and science of portraiture remains the primary source for understanding its processes and components as a form of qualitative research. They argued that "the negotiation of balance in works of art and research portraits relies on the artist's or researcher's judgment—the manipulating of elements to find what is right, what works, and the equally important experience of deciding what doesn't fit and what needs to be reconsidered or excluded" (p. 33). In constructing our own portraits, space limitations and a desire to balance the words given to each of the 23 portraits were among foremost considerations. What could be eliminated without distorting the portrait, and what details and words were essential to include? We tried to always create a physical frame, with attention to the ecological context, descriptions of the geography of the country or city, for example. "A reader should feel as if he or she is *there*" (p. 44). In skillfully written portraits, such contextual details in the opening paragraphs are "selections shaped by the central themes of the portrait that she wants to foreshadow" (p. 45). As described by Lawrence-Lightfoot and Davis, the writer of the portrait is an observer, usually an interviewer who creates the entire portrait based on observational and interpretive skill and using a variety of narrative devices including imagery and symbols.

For each woman we featured, we created portraits based on close reading of the self-narratives or stories the women had submitted. Some included rich descriptive details but others were sparse by comparison. We gathered more detailed information from some women by asking questions through email messages. In some cases we had access to their previously published writings as an additional data source in creating a portrait linked with the chapter's theme and subthemes. The portraits were framed in the chapter theme, as well as "matted" with the particular aspect of the framing subtheme they had been chosen to illustrate. Once framed, details of country and childhood served as foreground for unfolding personal and professional journey stories glimpsed in the texts of the portrait. The use of the author's own words added authentic tone and color to each portrait. Insights following each portrait reflected or depended on the perspective of the chapter author, functioning as an appreciative critic.

A most important similarity of the portraits we created and those described in the Lawrence-Lightfoot and Davis book is the focus on goodness, on "what is happening here, what is working, and why." The focus is on "underscoring what is healthy and strong" (p. 142). We have depicted goodness in the spirit of portraiture. Lawrence-Lightfoot and Davis again provide guidance: "The researcher must ask, What in this life would have resonance in other lives? How might this individual experience inform others like it?" (p. 153). It is important to understand that "the emergent themes identified in a specific portrait are not the only themes that resonate throughout an individual site or story" (p. 230). Weaving the portraits, without having known the terms, we gave attention to the forms Lawrence-Lightfoot and Davis advocated: *conception, structure, form,* and *cohesion* (p. 247). Attention was given to *conception* in the placement of the stories within particular thematic chapters. The portrait must first fit within the "overarching story" (p. 247). "Like the novelist the portraitist searches for the overarching vision, the embracing gestalt that will give the narrative focus and meaning" (p. 248). Then *structure* "serves as a scaffold for the narrative—the themes that give the piece a frame, a stability, and an organization" (p. 252). The elements of structure must relate to the theme. *Form*, on the other hand, is "a kind of 'mysterious phenomenon' that captures emotion and movement" (p. 254). They explained that "form gives life and movement to the narrative" (p. 254). Finally, because of *coherence*, pieces of the portrait fall into place and have an order and a unity. The voice and perspective of the researcher contribute to coherence. Sometimes the researcher is heard in terms of "voice as witness," other times becoming "voice as interpretation" (p. 259).

The power of *critical evocative portraiture* emerges both from a combination of the content details chosen for the portrait and how it is critically presented and framed. Each portrait chapter was constructed around major themes uncovered in the data analysis process. The portraits were then interpreted in terms of themes and subthemes, through highlighting insights from each portrait and subsequent selected scholarship in each chapter. By working from self-narratives, we have developed portraits primarily from the words of the person portrayed, a different way of developing portraits than explained by Lawrence-Lightfoot and Davis. Our portraits have the same dimensions—but perhaps are not subject to the same criticism of portraiture that was offered by English (2000). Our portraits are clearly offered from a point of view, whereas English criticizes Lawrence-Lightfoot's portraiture for what he calls her "failure to interrogate what it conceals, i.e., the politics of vision" (p. 21).

How Critical Evocative Portraiture Differs

Critical evocative portraiture illustrates a new method for studying leadership that differs from the general narrative inquiry approach or narrative interpretation approach. Our improvised process, best captured by *critical evocative portraiture*, was based on analysis of life journey self-narratives volunteered by a group of academically focused women with mutual commitments to social justice leadership. The approach could be used for studies of men. As previously described, when we turned to the question of what our approach might be called, we first considered various forms of narrative interpretation.

Within this genre several distinct approaches to illuminating the meaning of lived experiences have developed. Chase (2011) identifies four. In one, attention is focused on the relationship between people's stories and the quality of their life experiences. The emphasis is on what people's stories are about—an important end goal of the researcher is to collaborate with the participants to improve the quality of their everyday experiences. In another approach, narrative researchers are interested in not only the *what* of people's stories but also how they narrate their experiences, paying attention to linguistic phenomena. In particular, their goal is to show "how narrators make sense of personal experience in relation to cultural discourses" (p. 422). In yet another approach, researchers focus on "the relationship between people's narrative practices and their local narrative environments (p. 422). In this approach ethnographic methods are used to get a deeper understanding of the narrative environments in which the stories unfold. Last, according to Chase, is the narrative approach in which the researcher's and the other's stories are merged to "explore a topic or research question more fully by including the researcher's experience of it" (p. 422). Autoethnography is a version of this approach. Using Chase's language, our stories are not merged with those of the participants. However, we three coauthors also submitted narratives as members of the group and our portraits are included. We could be called complete-member researchers which is a term coined by Adler and Adler "to refer to researchers who are fully committed to and immersed in the groups they study" (1987, as cited in Ellis & Bochner, 2000, p. 741). The approaches Chase described, though distinct in certain ways, share some common elements. They all involve a close relationship between the researcher, the participants, and their stories and in-depth interviews as "the most common source of narrative data" (Bell, 2009 as cited in Chase, 2011, p. 423).

At first glance, the process we followed for our investigation seems to have a lot in common with narrative inquiry, especially autoethnography. But it has important distinguishing features. The most notable is that the researchers came into the scene only after the stories had been written and submitted for sharing. The second is that each individual was free to construct her story with no specific research questions to guide her, except for the loosely expressed invitation to authentically reveal her life journey toward being a promoter of social justice. With only this loose parameter, individuals were free to determine how they would make their contributions. The purpose was to know each other better. Because each member of the group grounded her story in the social context where her life unfolded, and was encouraged to use personal, creative ways to represent herself, we obtained not a homogeneous set of stories but a bricolage of assorted portraits of individuals leading for social justice. A bricolage has its benefits.

Close examination of each chapter's set of portraits (clustered in terms of common related themes) develops an ethnography, a bricolage if you will, for each set of stories, with the chapters becoming "a pieced-together set of representations that are fitted to the specifics of a complex situation" (Denzin & Lincoln, 2011, p. 4). We also did some piecing together of the portraits—using as resources the self-narratives, emails, conversation at conferences, and previous professional writing. A synthesis of the resultant ethnographies or portraits in each chapter exposes the total picture of the chapter theme in a deeper way than if only one person had been portrayed.

A third distinguishing feature of our approach is that this book project was initiated with a very important preexisting condition: trust engendered by our common commitments to social justice even before the research project officially was launched. A level of trust began to build at the first WLE conference in Rome and contributed to the submission of the stories collected during Phase One. Trust grew rapidly during and after the WLE group's second meeting in Augsburg. Trust was also nourished in the two meetings by the group's very open discussions and the free exchange of ideas, personal experiences, and expertise in the area of leadership and social justice. Due to the small size of those gatherings, close and personal relationships unfolded among the group members; this, in turn, contributed to the desire to get to know each other better. In addition, at the second meeting in Augsburg, the women came to feel even more comfortable about sharing details of their lives after Linda presented a sensitive and insightful analysis of the first 12 stories. As a result of that increased trust, more of the women went away feeling at ease with writing their personal journeys and exposing them to the rest of the group.

A final distinguishing feature of our approach was the open circulation of all stories on the WLE group's listserv. The stories were submitted over a 2-year period, during which a person reading a story could become influenced by what another had done, leading to cumulative encouraging of trust. This phenomenon aligned with our purpose in sharing the stories—to get to know each other and to show how our life journeys have informed and influenced our work for social justice within the parameters of our particular cultural contexts. As each one of us read the story of another, we could relate better to that person, be inspired by the other woman's life, and be encouraged to continue pursuing our goals for social justice. All of these factors led to a level of detail and personalization that interviewing cannot capture. In conclusion, our approach generated powerful, emotional energy that coursed among the group members throughout the process of collecting, analyzing, and presenting the results. This sustained energy flow influenced how we came to see each other and how we behaved—both collectively and individually. Clearly each portrait carries the power to teach, to bind individuals together, to provide meaning, and to incite action that promotes a more just world. Because evocative portraits are emotionally rich, they become memorable parts of our shared humanity.

Feminist Pathways to Social Justice

We came to the writing process and developing *critical evocative portraiture* from different personal and professional backgrounds. Our teaching and scholarly interests have different focuses, but commitment to equity is an underlying commonality. The following individual statements—about our history as researchers and scholars and our engagement with the concepts of feminism, leadership, and social justice—illustrate differences as well as that underlying commonality. If we start from bell hooks's (2000) definition of feminism as "a movement to end sexism, sexist exploitation, and oppression" (p. 1)—and imagine living in a world … "where a vision of mutuality is the ethos shaping our interaction" (p. x)—then each coauthor has at some level been on a feminist pathway to social justice.

Linda

Professionally, I came to my position as an academic late in life, one could say. It was a new beginning after living through the 1960s and 1970s with the sense that the women's movement and feminism did not have much to do with me. That was before I had tried to do anything unconventional, however. My dissertation research was an analytic historical case study of board of education decision-making processes in which I had participated as the board of education president. Pseudonyms were used for all participants and the community. The board decisions under study were those made in response to the conviction of the superintendent of schools of the sexual assault of a student. On many levels it was the beginning of my feminism. So I have been both outside and inside the women's movement, but resisted labels.

Having been a leader in high school and college years, in my communities, and now in my academic role, women's leadership has been a lifelong interest. I have taught courses on women's leadership in the USA and in Greece and published articles and books featuring women leaders. Social justice leadership has been a passion developed since I moved to Peoria, Illinois, in 1990. Peoria is a small city with major urban problems. It has been the site of my social justice education. I have been particularly drawn to issues of poverty, race, and gender in my teaching and research. I have experienced success as a professor in positively affecting students' deficit-thinking attitudes toward people living in low-income families.

Professionally, based on my four books, I am comfortable with describing myself as a storyteller. Most of my research has been qualitative and focused on leadership. Looking back, each of my earlier books has a social justice purpose and contains elements of critical evocative portraiture. Featured participants have been identified by their real names and settings, rather than fictionalized or presented anonymously. In that way, my major work has gone against conventions of the field. My first book (Lyman, 2000) was created as a portrait, an extended single case study of caring leadership conducted over a 3-year period. The book was directly inspired by the scholarship and encouragement of Nel Noddings. When I invited her to speak at Bradley University in Peoria, she graciously took the time to review my 1995 AERA paper about a caring leader and told me that I could turn it into a book. She said that nothing like what I proposed existed—i.e., to show what caring leadership looked like—and she gave me the name of her publisher to contact, suggesting that I use her as a reference for the inquiry. Part of my purpose in that book was to degender the concept of caring leadership, which is typically ascribed to women.

In constructing this book-long portrait of Ken Hinton, at that time an African American early childhood center principal in Peoria, Illinois, I was also influenced by and cited the work of Sara Lawrence-Lightfoot and Davis (1997) on portraiture as a mirror of goodness and Elliot Eisner (1998) on evaluation and qualitative inquiry. I was attracted by his educational connoisseurship concept and his insistence that the researcher's voice must be heard. Eisner also drew from the practice of criticism, describing it from an artistic perspective as being about enabling others "to experience qualities and meaning" (p. 3) of a work of art. He wrote, "A word about voice. I have tried in this book, as in all of my writing, to keep a sense of voice present. I want readers to know that this author is a human being and not some disembodied abstraction who is depersonalized through linguistic conventions that hide his signature" (pp. 3–4). In my books I also have kept my voice present.

My second book (Lyman & Villani, 2004), which Christine Villani and I were invited to write, was a comparative case study of two successful minority women leaders, one African American and the other Hispanic, in high poverty elementary schools, one in Peoria, Illinois, and the other in Bridgeport, Connecticut. It presented portraits of these two outstanding principals, with the focus on their leadership practices and effects of their leadership on learning/achievement, parent satisfaction, and effectiveness. The research was motivated by personal commitment to promote social justice leadership that can mitigate the effects of poverty on learning by children living in low-income families. The book also reflects my ongoing interest in women leaders. Data was gathered through on-site observation for over a year, a series of interviews with the principal, and interviews with representative staff and faculty. The ending of the book focuses on leadership approaches to influencing and eliminating attitudes and beliefs that maintain deficit thinking.

My third book (Lyman, Ashby, & Tripses, 2005) was a coauthored multi-case study of leadership practices of outstanding women leaders from Illinois. The research was the product of a statewide woman's organization, Illinois Women Administrators, for which I was Executive Director for 4 years. The collaborative feminist research project began with the collection of 18 narrative/transcripts from interviewees identified by a reputational group process. The interviews were conducted by 18 different women using a collaboratively developed interview guide. The purpose was to look for commonalities in the leadership practices of these outstanding women leaders. The major themes were developed in the book, with in-depth profiles of five women used to illustrate the major themes.

A definition of feminism important to me, and one that has inspired my work with gender issues in my classes, was shared by Astin and Leland (1991), who called feminism "a system of ideas and practices which assumes that men and women must share equally in the work, in the privileges, in the defining and the dreaming of the world (Lerner, 1984, p. 33)" (p. 19). I am a storyteller who paints portraits in words. My aim as a teacher and a writer is to reflect their own goodness back to people in a way that helps them achieve their dreams and build a more just world.

Jane

Some equate feminism with and mistake it for fanaticism. Some believe feminists are rabid men haters and destroyers of family. I do not; I hold family very dear and have two sons I would die for. For me feminism offers a guiding philosophy, one that embraces social justice and has a very broad agenda. Yes women's human rights are central to that agenda but so are the human rights of other oppressed peoples. My career in education, which has spanned 48 years, has enabled me to engage in the activism that is central to feminism. For without a commitment to support, to take action, and to advocate for and with others feminism does not walk the talk, it is hollow and useless. Feminism is activism.

I have often wondered where my passion for social justice came from. My comfortable middle class background seems an unlikely breeding ground for my activism. However, even as a child I remember feeling profoundly sad when I witnessed unfairness or was on the receiving end of what I perceived to be unfairness. Yet, it was not until much later when as a new teacher I developed a broader and more sophisticated understanding of poverty and discrimination and how they can limit and hurt. In the early 1970s I began to engage with and debate the ideas of feminism. After two failed marriages, I experienced firsthand discrimination and the disapproval some expressed for "single/divorced mothers" and realized that if as a well-educated middle class woman I was experiencing discrimination how much worse would it be for those trapped in poverty, or the abused, or indigenous peoples?

However, there was no momentous event that catapulted me into an awareness that the world was a very unfair place. It was a gradual awakening that greed and the abuse of power by individuals and by governments profoundly disadvantaged and oppressed. I also felt a real urgency to try and do something about that. Recently at my retirement celebration, friends and colleagues were asked if they wished to say something about me. A friend I had worked with for 5 years as a high school counselor stood up to speak. He said "At staff meetings when we were discussing issues and what to do about them you could guarantee that Jane would ensure we understood how that might affect, including disadvantage, others. She always gave the social justice perspective." I do remember that. I also remember the compulsion I felt to speak and how I had to pluck up the courage, how my heart raced, how my hands sweated, and how my face flushed. I knew that at times I was taking an unpopular stand and would be on the receiving end of the disapproval of others, yet I was compelled to speak out.

Further study and meeting women and men who were similarly concerned provided me with ideas and the support I needed to take action. After 22 years teaching and counseling in high schools, I embarked on an unplanned academic career in a university that enabled and encouraged me to follow my social justice passion. My teaching, research, and activism focused on social justice in education, and feminism was the theoretical and practical tool I used to guide my work. My PhD thesis focused on how feminist high school principals enacted a social justice agenda in a right-wing political climate. My supervisors were both feminists, one of them was the Dean of the Faculty of Education. She knew my work and my commitment to advancing the life chances and choices for women, so when I wanted to take 2 years leave without pay from my tenured faculty position to go as a volunteer adviser to the Director of Women's Affairs in Vanuatu, she generously granted me the leave.

My experiences in Vanuatu were life changing. Vanuatu is a small south west Pacific island nation. The status of women is very low. My role was to support the staff in establishing an effective government department with strong organizational structures and processes that supported the government's policy directions for women. What a privilege it was to work alongside women in shaping Vanuatu's human rights policies for women. I was able to walk the talk of feminism, although the word feminism was not used in Vanuatu culture as it was considered too radical and anti-Christian. My experiences in Vanuatu showed me the international disparities for women. In comparison to women in New Zealand, the women of Vanuatu have few human rights. These experiences shaped my academic career on my return to New Zealand.

For the final 8 years of my academic career, I was able to continue to walk the talk of feminism. My social justice work mainly, but not solely, focused on Pacific education. I directed a large teacher education contract in the Solomon Islands, a neighbor of Vanuatu. I am convinced that economically developed nations like New Zealand have a moral obligation to support and aid economically developing countries, not as colonizers but as partners sharing decisions, wealth, and expertise.

Angeliki

As a relatively young academic, I came into the field of researching school administration, leadership, and management with a formal preparation that provided a rather constrained lens for conducting research. Qualitative research methods had received considerable attention in my graduate courses, but they were often overshadowed by the apparently more powerful and objective quantitative approaches. Squeezed by this tension, my first research endeavor—my dissertation—featured a merging of the two approaches, an effort to strike a balance and to explore them both in greater depths. This continued after my graduation when I started my journey into the field of academic research. In this ethos my main objective was to identify the necessary skills, knowledge, attitudes, and behaviors that would turn an everyday school administrator into a *leader*.

Through my academic work and closer engagement with schools and school leaders, it became apparent that school leaders who aspired to transforming their schools would have to pay attention to issues of values, beliefs, equity, individual and collective cultural identities, stereotypes, and cultural misunderstandings. Without critically reflecting on such issues, and creating the time and space for others to do the same, school leaders cannot hope to see their organizations evolve into democratic communities of shared knowledge and practice.

It also became apparent to me that traditional modes of researching, and traditional ways of preparing school administrators, could not provide adequate guidance regarding such issues. If future school leaders are to promote equity and social justice, they have to be able to reflect on their self-identities and to adopt multiple cultural lenses when analyzing and solving problems. Moreover, they must heed Delpit's (1995) admonition to "consciously and voluntarily make our cultural lenses apparent" (p. 151).

With these insights, I began to think of social justice as being achieved through the processes of *reflecting* and critically examining ourselves and others through multiple cultural lenses and *acting* to alleviate injustices and to improve relationships at all levels—micro, meso, and macro.

The need to infuse educational administration with more social justice is paramount and is increasingly recognized by researchers, theoreticians, and practitioners. For example:

> Recent conversations and presentations at the annual conferences of the American Educational Research Association (AERA) and the University Council of Educational Administration (UCEA) have identified social justice as a new anchor for the entire profession, servant leadership as a new metaphor, and equity for all as a new mantra. (Brown, 2004, p. 80)

This development in thinking about the needs of administrators has spurred searching for new methods for investigating issues related to equity, values, and cultural differences. The more established qualitative research methods—based almost exclusively on in-depth interviews, content analysis, and conventional narrative inquiry—cannot adequately describe and explain the complexities that attend those issues. New, unconventional methods for triggering, provoking, and encouraging the new generation of transformative school leaders to think critically and to reflect systematically on social justice issues are urgently needed. Brown (2004), for example, has advocated

> approaches that focus on skill and attitude development, such as cultural autobiographies, life histories, prejudice reduction workshops, cross-cultural interviews, educational plunges, diversity panels, reflective analysis journals, and activist assignments at the micro, meso, and macro levels … to help students and professors develop their capacity to reflect and act more effectively. (p. 81)

For the past few years, therefore, my thinking and academic work have centered on such alternative approaches, with an emphasis on praxis. Praxis is the constant interplay of critical reflections and subsequent actions. Because change cannot be achieved through reflection alone, we are called to adopt what Freire has named policy praxis, which, based on dialogue, targets the “dismantling of oppressive structures and mechanisms prevalent both in education and society” (Freire & Macedo, 1995, p. 383). Along those lines, I see my role as similar to Socrates’s method of challenging, provoking, and pushing school leaders’ patterns of thinking beyond their comfort levels so that they become better able to unearth, examine, and eventually implement actions that work for justice and social change within their unique cultural contexts.

Up until recently I was using dialogue as the primary means to achieving these goals, in tandem with reflective journal writing as a way to help future leaders become critical and stay focused on the issues under discussion. Because dialogue is a social act, and requires the cooperation and willingness of participants to make it successful, I came to the notion of quantum leadership. This genre of leadership flourishes in an ethos of cooperation and integration. Members of a group are co-creative partners, acting as catalysts for changes within their organization. As Foster (1986) stated, “Leadership is an act that enables *others* and allows them, in turn, to become enablers” (p. 187; emphasis added). Enablers, I believe, are what we need to make social justice praxis within our school systems.

Although my investigation of quantum leadership is at an early stage (Lazaridou & Fris, 2008), I use metanarrative inquiry as the primary method for collecting information. Irvin and Klenke (2005) described this as

> a qualitative method that integrates historical, psychological, and cultural perspectives and offers a highly developed body of self-knowledge depicting the narrator’s self-interpretation that reflects the ontological integrity of meaningful experiences in the individual’s life. (p. 6)

In this perspective, metanarratives are treated as “depositories of meaning” rather than mere descriptions, and they reflect people’s *telos*—sense of ultimate purpose in life; *chronos*, understanding of the past, not for the sake of the past but for what historical understanding can do in the present (Klenke, 2004, pp. 15–17); and *hermeneia*—worldview (Irvin & Klenke, 2005, pp. 14–19).

Conclusion

For the study of social justice leadership and study of leadership generally, we believe *critical evocative portraiture* is a methodology that releases and honors the complexity of powerful leadership in difficult contexts. We offer it as a research approach that can provide insight into the leadership challenges of the times. The book *Shaping Social Justice Leadership: Insights of Women Educators Worldwide* offers a point of view and integrates a critical perspective, connecting practice to relevant selected scholarship. Working from the power of women’s stories and using portraiture, we demonstrate scholarship as a feminist pathway for social justice leadership. We were each personally affected by this writing process.

Linda

The book for me became that larger story I have been preparing my whole life to write. In college I dreamed of working at the United Nations and making a contribution to world peace. I gave up that big picture vision for a domestic life when my children were young, but the dream of contributing to world peace emerged again when I was selected to be a Fulbright Scholar in 2005. The transformative 6 months my husband and I spent in Greece was a body/mind/spirit odyssey that led directly to my participation in the *Women Leading Education Across the Continents* research group. I have lived since then with an enlarged sense of the world and developed a deeper commitment to social justice. My life has been immeasurably enriched by the WLE group members and the privilege of writing this book. The stories of my WLE friends are interwoven and intertwined in my heart. Their stories give me strength to continue on my path as a dream weaver and bridge builder, working to make a difference.

Jane

Writing *Shaping Social Justice Leadership* with Linda and Angeliki, my first book, has afforded me the opportunity to reflect on my social justice platform, to learn from the women who feature in the book, and to plan my social justice work in my retirement. Social justice work is lifelong and does not end when formal employment ends; it is in your bones!

Writing *Shaping Social Justice Leadership* has been both a surprise—I thought I never would write a book—and inevitable, a book waiting to happen. So why now? A number of things came together at the right time. I was at the end of my career and so had a body of social justice work to reflect back on. Being invited to attend the first WLE conference in Rome introduced me to women scholars who shared my passion for social justice leadership. I met Linda who invited and encouraged Angeliki and myself to join her in writing the book. Her previous experience as a published author was invaluable. She knew how to navigate the publishing process.

Social justice leadership work is hard work and can be exhausting and lonely. Meeting the women featured in *Shaping Social Justice Leadership* and writing the book with Linda and Angeliki has helped me to find the energy and courage to continue social justice leadership work and to feel supported and inspired in that work.

Angeliki

My involvement with the book *Shaping Social Justice Leadership: Insights of Women Educators Worldwide* advanced my thinking and ways of researching. The power of the self-narrative portraitures that I developed for the book made me realize that this method provides a profoundly convincing way to show how acts of social justice take place in various cultural contexts and in unique personal circumstances.

I do not identify myself as a feminist, and my research has not focused exclusively on promoting feminist issues; nevertheless, I was greatly affected by the complexities, misfortunes, conflicts, and injustices experienced by the individuals portrayed in the book, as well as the courage, faith, and strength they mustered to pursue their dream of a more just world. I believe that if their examples speak to the hearts of everyone—men and women, boys and girls, leaders and followers—then small acts of justice may start appearing around the world. I see my role as helping to make this happen in my part of the world by striving to release the potential for leadership that exists at all levels in the world of education—in students, teachers, principals, higher office personnel, and other stakeholders.

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Chapter 16
LeaderPAR: A Participatory Action Research Framework for School and Community Leadership

Gary L. Anderson and Erika Bernabei Middleton

In the early 1980s, studies of schools as workplaces portrayed a school professional culture of isolation in which norms of collegiality were rare (Lieberman and Miller, 2008; Little, 1982, 1990). The professional development of teachers still followed a traditional in-service model. The effective schools research of that time cast the principal as a key figure in creating effective schools by providing strong management and instructional leadership (Edmonds, 1982). Over time, movements promoting collaborative action research (Somekh, 2010), professional learning communities (Lave & Wenger, 1991), and other forms of professional learning became more prominent and began to shift the professional development of teachers toward more school-based, collaborative forms. To the extent that these professional learning communities were authentic, they often resulted in teachers engaging in deep and honest reflection on their practice and the school and community as a context for teaching and learning (Lieberman & Miller, 2008). By the late 1990s, academic leadership theory in education was moving from images of heroic leaders at the top of a hierarchy to the notion of leadership as distributed across multiple members of an organization (Gronn, 2000; Spillane, Halverson, & Diamond, 2004). While diffuse notions of leadership among school professionals became popular, such diffusion typically ended at the school door.

In this chapter, we offer both a methodology and a stance toward school leadership that draws on a long tradition of community-based, participatory action research (PAR). Many paternalistic approaches to schooling—particularly many inner-city charter schools—view communities as problematic and attempt to "make over" students (Whitman, 2008). This is perhaps understandable since

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many poor communities, divested of jobs and infrastructure, are living at a survival level in which basic issues of strictness, discipline, and basics are paramount (Wilson, 2009). However, as Gold, Simon, and Brown (2004) and Shutz (2006) point out, there is as much, if not more, of a need to build community capacity in many inner-city and rural areas as there is to build school professional capacity. Without fostering both school and community capacity, through building both human and economic capital, students who live in areas of concentrated poverty are not likely to experience upward social mobility in spite of a discourse of *no excuses* and *no child left behind*. A PAR stance for educational leadership would bring a deep commitment to personal and community empowerment and a methodology based on respect for a community's strengths and assets.

A PAR approach to leadership (LeaderPAR) does not limit its attention to school professionals and organizational learning, although professional capacity building and organizational learning are part of a PAR approach to leadership. Thus a central focus of LeaderPAR is to bring greater balance between school and community-based approaches to school capacity building and social change. There are three primary foci to LeaderPAR: (1) the professional capacity building and organizational learning focus of a distributed leadership framework within schools (Spillane et al., 2004), (2) a focus on authentic, appreciative school *and* community-based inquiry that is not data driven (Halverson et al., 2005), but rather data supported (Herr & Anderson, 2005), and (3) leadership frameworks that focus more explicitly on democratic governance and community organizing (Gold et al., 2004; Goodman, Baron, & Myers, 2004; Woods, 2004). In the rest of this chapter, we will first provide an overview of participatory action research for those who may be unfamiliar with it as a methodology or stance toward research and practice. We will then address the three central foci described above and how they might impact notions of leadership and school reform.

PAR: A Methodology and Stance for Leadership

The current popularity of distributed leadership and learning communities as guides to research and practice are an improvement over a "correlates of effectiveness" approach to school improvement (Edmonds, 1982; Leithwood, Day, Sammons, Harris, & Hopkins, 2006). However, by limiting its focus to work redesign and building school-level professional capacity, it fails to address participatory reforms that promise greater school-community congruence (Gonzalez, Moll, & Amanti, 2005), more additive and antiracist pedagogies (Valenzuela, 1999), and public forms of accountability that are community driven (Gold et al., 2004).

In this section, we will explore participatory action research (PAR) as a stance toward school and community-based inquiry, facilitated by school leaders, that provides leaders, teachers, students, and community members with an approach that is more process oriented, more inclusive, and less hierarchical. PAR challenges the framework (or subverts the framework) of traditional research on school leadership by moving school professionals toward an engaged, cyclical relationship with communities to define, examine, and develop action steps to their own problems. Unlike more narrow data-driven approaches, PAR continually loops through a set of questions, analyses, solutions, and back again, ensuring that the process is grounded, situated, and fulfills the goal to develop both solutions and empowerment.

There are many traditions of PAR that have grown out of different academic fields and different approaches to change and they sometimes go by different terms. In public health, PAR is called community-based participatory research (CBPR) (Minkler and Wallerstein, 2003). In education, it is often called merely action research or practitioner research, but tends to lack the community perspective. There are also traditions of organizational learning and workplace democracy that tend to use participatory action research (Whyte, 1991). PAR is also used in international development and adult education.

Although some traditions see Kurt Lewin as the founder of PAR, more social justice-oriented forms of PAR tend to view Paulo Freire (1970) as their greatest influence.

Although his focus was on adult literacy, Freire's legacy is his claim that social inquiry should promote research *with* participants rather than *on* them and the use of what he called "generative themes" that grow out of the problems that a community perceives as the most crucial. The Freirian concept of "limit situation" also speaks to the need for communities to transcend immediate limits to envision a more just future. PAR supports the community-grounded empowerment that combats feelings of defeat around limit situations and pushes communities toward transformation.

Freire's views on the transformative power of this form of inquiry are powerfully stated when he writes that "the silenced are not just incidental to the curiosity of the researcher but are the masters of inquiry into the underlying causes of the events in their world" (Freire, 1982, p. 30). A Freirian approach, which is grounded in popular education and adult literacy, insists on the ability to read the word and the world. For school leaders, this translates as the ability to deal with the day to day while also understanding the big picture forces that influence and partially constitute the day to day. De Schutter and Yopo (1981) have provided a useful list of characteristics of PAR focusing on reading the word and the world:

- The point of departure for participatory research is a vision of social events as contextualized by macrolevel social forces.
- Social processes and structures are understood within a historical context.
- Theory and practice are integrated.
- The subject-object relationship is transformed into a subject-subject relationship through dialogue.
- Research and action (including education itself) become a single process.
- The community and researcher together produce critical knowledge aimed at social transformation.
- The results of research are immediately applied to a concrete situation (De Schutter & Yopo, 1981, p. 68).

The Columbian Orlando Fals-Borda has also had an important influence on PAR, and he also emphasizes the need to understand the relationship between micro- and macrolevel forces. According to Fals-Borda (1991), “PAR induces the creation of its own field in order to extend itself in time and space, both horizontally and vertically, in communities and regions. It moves from the micro to the macro level as if in a spiral, and thus acquires a political dimension. The final evaluation or applied criterion of the methodology revolves on this political dimension and the opportunity that it offers for making theory concomitant with action” (p. 6). Fals-Borda sees PAR as an “experiential methodology” using reliable information to empower poor and oppressed communities. The goals of PAR for Fals-Borda are

> (l) to enable oppressed groups and classes to acquire sufficient creative and transforming leverage as expressed in specific projects, acts and struggles; and (2) to produce and develop sociopolitical thought processes with which popular bases can identify. (Fals-Borda, 1991, pp. 3–4)

Fals-Borda’s work resonates with Freire’s own statement that “In this context research becomes a means of moving them beyond silence into a quest to proclaim the world” (Freire, 1982, p. 30).

Some approaches to PAR make the community a more explicit focus of their research. For instance, practitioners of public health have long used an approach they refer to as community-based participatory research (CBPR). Minkler speaks to the community-oriented ways that CBPR engages in research that focuses on health issues and health disparities.

> Together with community demands for authentic partnerships in research that are locally relevant and “community based” rather than merely “community placed,” this frustration has led to a burgeoning of interest in an alternative research paradigm. Community-based participatory research (CBPR) is an overarching term that increasingly is used to encompass a variety of approaches to research that have as their centerpiece three interrelated elements: participation, research, and action. (Minkler, 2005, p. ii3)

While CBPR, like other forms of inquiry, can take on more traditional and data-driven forms, at its best, it is an inquiry process that takes time, relationship building, and power sharing in order to come up with questions and answers that best connect to community priorities in public health.

Appreciative inquiry, another PAR approach, is an assets-oriented process to create organizational or community change. As opposed to a deficit orientation toward communities, appreciative inquiry looks to community assets in developing questions and solutions. Kretzmann and McKnight (1993) think of it as community transformation from the inside out—beginning with the wealth of experience and knowledge in a community and developing empowering and relevant structures to make use of those assets (p. 6).

Michelle Fine views PAR as “practiced within community-based social action projects with a commitment to understanding, documenting, or evaluating the impact that social programs, social problems, or social movements bear on individuals and communities. At its core it articulates a recognition that knowledge is produced in collaboration and in action” (Fine et al., 2003, p. 173). Fine’s work on YouthPAR is of particular pertinence to this discussion as it shows how PAR can provide traditionally "silenced" people, in this case youth, a venue that enables them "to interrogate and denaturalize the conditions of their everyday oppression (inspiring) a process of community and knowledge building" (Torre & Fine, 2006, p. 271). In a powerful way, LeaderPAR can contribute to the development of space and power sharing with silenced communities to develop meaningful policies that speak to the needs of students and families.

While it is important to maintain the community-grounded nature of PAR, feminist and antiracist scholars have begun to push for using PAR methodology with a more intentional structural racism or feminist critique (van der Meulen, 2011). Bell (2001) writes about the history of the Black Nationalist and civil right movements as deeply grounded in PAR using action techniques to break down structures of racial oppression. However, these movements have not been recognized as part of the PAR tradition—requiring the development of Feminist Anti-Racist PAR (FARPAR) to connect what these scholars view as disconnected methodology to practice and the history of structural oppression in the United States (van der Meulen). Feminist Action Research's purpose is to locate issues and questions in the context of "the diverse and often disparate ways that poor women negotiate their lives, and to respond to social injustices through advocating collective action and social change" (Reid & Frisby, 2004, p. 2). In the context of school-community relationships, a stance that identifies a particular oppressive construct like racism could be a bridge between the isolated school and the leadership that makes decisions inside of that isolated school from which PAR methodology can organically stem.

LeaderPAR: Making School Leadership More Community Based and Participatory

Since the 1980s, research on leadership has demonstrated the inauthenticity of most participatory and shared governance proposals for school leadership. More than a decade ago, coauthor Anderson (1998) made the following evaluation of experiments with participatory forms of leadership.

There are signs that the participatory reform movement in education is running into problems. For example, several case studies have suggested that shared governance structures may not result in significant participation in decisions (Malen & Ogawa, 1988) but, instead, result in contrived collegiality (Hargreaves, 1994), reinforce privilege (Lipman, 1997), and even create a tighter iron cage of control for participants. There is also evidence that they may be costly to service, waste members' time, delay important decisions, and lead to inefficiency and lower productivity (Beare, 1993). From the grassroots level, teachers in schools are increasingly complaining that participation is often bogus, takes time from their interactions with students, and intensifies an already heavy workload leading in many cases to teacher burnout (Gitlin & Margonis, 1995).

In industry, workers are becoming increasingly aware that, while they are being empowered on the shop floor through participation in selected work-related decisions, their unions are being busted, their companies downsized, their jobs moved overseas, and their salaries and benefits slashed (Brecher et al., 2000). Many participants are reporting a sense of disempowerment rather than empowerment from so-called participatory reforms and, in the case of education, are increasingly calling for more authentic ways to participate in the governance of their schools. School practitioners are less and less willing to give time to participation schemes they see as inauthentic. Meanwhile, a growing coalition of poor and minority parents and communities, home schoolers, and the religious right are giving up on achieving more authentic forms of participation in decisions that affect their children and are turning instead to a growing voucher movement that will allow them to choose their own schools (pp. 572–573).

Not much has changed since this was written. With mayoral control, authentic citizen input in many urban districts is nonexistent. School-based decision-making and inquiry are even more circumscribed and co-opted by scripted curricula, high stakes testing, and testing data (Scherer, 2008/2009). An education industry has grown exponentially, leading to greater commodification and commercialization of professional development (Anderson & Herr, 2008, 2011; Burch, 2009). The term “empowerment” is still used to describe teacher and principal autonomy, even while their decisions are driven by testing pressures, they are blamed for school and societal failures, and salaries, benefits, and pensions of public workers are under attack. What is needed is a framework with a stance toward participation and democracy capable of recognizing the difference between authentic and inauthentic forms of participation.

The reason that stances like distributed leadership—and its predecessor, school-based management (SBM)—end at the school door is largely because they are primarily a workplace redesign model aimed at building professional capacity and increasing production. As Herr and Anderson (2008), Hatcher (2005), and Woods (2004) argue, current notions of distributed leadership or professional communities do not address democratic theory or theories of power. This is not to say that we have not come a long way since the 1980s in developing greater professional capacity in schools, but embedded as they are in new managerial and neoliberal practices, such models are increasingly co-opted and distorted in numerous ways (Arellano-Gault, 2010).

In this section, we will briefly address the three foci of LeaderPAR described above: (1) a method for building professional and community *capacity* and *participation*; (2) authentic, appreciative school and community-based *inquiry* that is not data driven, but rather data supported; and (3) *leadership* frameworks that focus more explicitly on democratic governance and community organizing. Each of these need to be further developed conceptually and they need to frame new research in the field of educational leadership, so that we can obtain empirical evidence of the viability of LeadPAR and its limitations.

Building Professional and Community Capacity Through Participation

In spite of attempts by high stakes accountability and a growing private sector school improvement industry (Burch, 2009) to commodify school-based inquiry, there is a growing consensus in research on school improvement that school leadership should be about creating "smart systems" (Rothman, 2009) that build communities of inquiry and distribute leadership across the school community (Leithwood et al., 2006). However, to the extent that these smart systems of distributed leadership limit inquiry to school professionals, they may be merely reproducing the very system that they claim to change. This is especially true when they move beyond functionalist, productivity claims to also make social justice claims.

Distributing leadership beyond the school may seem impractical given that the principal's role expectation has traditionally been to buffer teachers from parents and keep the community at arm's length. Distributing leadership to students is also anathema in most schools, which is why most YouthPAR is done in communities, not in schools (Cammarota & Fine, 2008). However, if we look at the progress that has been made in shifting teacher culture from one of isolation to one of visiting each other's classrooms and engaging in learning communities, there is no reason why we cannot change this aspect of principal and teacher culture as well. There is a growing recognition that in order to have successful schools, we need to build professional capacity within the schools, but we also need to build greater capacity in communities—however, this is defined—so that children come to school ready to learn and so that communities can hold their schools accountable.

Within our conceptualization of LeaderPAR, notions of accountability shift from top-down, outside-in accountability through testing and markets to greater public accountability—i.e., community and parent accountability. Within a PAR framework, leaders recognize that relationships, power sharing, and active engagement are the substance of accountability. Understanding schools as embedded in community shifts the construct away from leadership as managerial and closer toward empowering relationships with community. Gold et al. (2004) write about the importance of parental engagement from a community organizing lens—a deeply empowered process of trust building within a social justice framework. Connecting community organizing and parent engagement envisions adult roles in schools as more than supportive of an individual child's success, instead "extend(ing) beyond the needs of their own children to the needs of all children in their community" (Gold et al., p. 242).

While there is currently much talk about principal and teacher autonomy, simply providing principals with more control over their budgets to hire vendors is not necessarily an empowering practice. Professional autonomy in countries like Finland is complemented by a major investment in teacher education and development and eschews high stakes standardized testing and zero tolerance policies that too often undercut the very professional autonomy that is sought (Sahlberg, 2007).

PAR's concern with understanding microlevel practices within macrolevel policies brings a much-needed dimension to not only educational leadership but also school reform movements.

As long as distributed leadership is primarily focused on a school-based, work redesign model, it will have only limited success. LeaderPAR seeks to build on the progress made through shared leadership approaches by extending them beyond the school house door. It also insists that the process of capacity building cannot be separated from broader citizen participation in decision-making. In this sense, what must be distributed is not only professional expertise and information but also the power of citizens to have input into decision-making. Where this has been successful, schools and communities have been able to sort out those areas that are best left to professional expertise, although most curriculum developers will agree that a good curriculum is informed by a community's funds of knowledge and is designed with input from a local community (Gonzalez et al., 2005).

Many variants of PAR are synonymous with community organizing in which data is gathered in order to further the goals of social change. Building community capacity and power is a goal of community organizing, and it has been successfully used to leverage forms of school reform that respond to community needs (Rogers & Terriquez, 2009; Shirley, 1997; Warren & Mapp, 2011). As noted above, Gold et al. (2004) view building community capacity and power through grassroots leadership development as creating a form of public accountability for schools and districts. The point here is not that we should train principals as community organizers but that principals can make links to empowered communities to promote a balanced approach to improving the education of their students in ways communities feel are important.

Authentic, Appreciative School and Community-Based Inquiry

Movements for teacher research and learning communities in schools have emphasized the importance of using "data" to make collaborative decisions in schools, although what counts as data has often been contested (Anderson & Herr, 2005; Cochran-Smith & Lytle, 1993). The advent of accountability systems in many states in the 1990s that used high stakes testing forced teachers to define data largely as the results of standardized tests, and spreadsheets of student outcomes replaced other, more qualitative and collaborative, forms of data. Because of this shift to an emphasis on test data, it has become less clear whether learning communities are meant to build habits of inquiry and promote equity throughout the school or whether they are mainly a strategy to implement the new assessment databases their districts are purchasing to meet NCLB's Annual Yearly Progress targets (Means, Chen, Debarger, & Padilla, 2011; Wayman & Springfield, 2006). "Data-driven decision-making" led by venture philanthropy, business, and politicians is viewed by many as co-opting authentic forms of school-based, professional inquiry (Cochran-Smith & Lytle, 1993; Herr & Anderson, 2008)

Leaders using a PAR stance, while supporting multiple forms of accountability, would recognize and reject narrow forms of accountability based on current business models such as data-driven decision-making and "continuous improvement," concepts associated with the popularity of Total Quality Management approaches of the 1980s. Business approaches tend to be popular and require quantitative statistical data that aids in the elimination of product variance, resulting in product quality based on uniformity. Such approaches, when translated to education, tend to reinforce hierarchical arrangements of experts and nonexperts and the definition of "data" as largely quantitative and test oriented. It also stresses outcome data over process data and organizational outputs over inputs (testing without investing). A PAR approach to inquiry not only broadens data gathering to include students and the community whenever feasible but also focuses data gathering on issues of equity within the school, district, and community.

LeadPAR as a Leadership Framework

What makes LeadPAR unique is that it provides a leadership framework that combines school and community capacity building, participatory inquiry, micro- and macrolevel advocacy, and a social justice orientation. Our aim here is not to promote one more leadership theory, but rather to push distributed leadership theories beyond the school and toward more critical and inclusive notions of learning communities. While most leadership theories in educational administration have a functionalist orientation, there are some that have broken ground in terms of promoting greater democracy and social justice. Foster's (1986) and Bates' (1980) early work opened up the possibility of theorizing educational leadership in more radical ways. More recently, Theoharis (2007) has made inclusion central to educational leadership, defining inclusion beyond special education, but not beyond the school. Woods (2004) and Hatcher (2005) have provided a direct critique of distributed leadership theory and Barros (2010) has critiqued new public management through his notion of emancipatory leadership. Moving outside schools, Ospina and Foldy (2005) have developed a theory of social action leadership that is based on empirical data of social action organizations.

Conclusion

In schools today, parental choice and mayoral control are replacing authentic forms of community input into their schools. The system world of high stakes accountability regimes for both students and teachers has colonized a life world of collaborative internal forms of accountability and community input (Sergiovanni, 2000). A leadership framework is needed that can build on—not undermine—the authentic movements since the 1980s that have led to reculturing schools around norms of collegiality and professional learning communities. The idea of community schools is not a new one. Samuel Everett (1938) promoted community schools in the 1930s and principal Leonard Covello created a community school at Benjamin Franklin High School in East Harlem (Johanek & Puckett, 2007). Some aspects of Geoffrey Canada's Harlem Children's Zone incorporate some aspects of the community school tradition, although typically what remains of the movement today is the client-oriented notion of integrating services through full service schools. There is little attention to the empowering, democratic dispositions that Leonard Covello sought to instill in students. Johanek and Puckett describe how Covello linked being a high school principal to local community organizing and the development of political and civic development in the young adults under his charge.

> Through its behaviors—notably, the East Harlem housing campaign—it modeled the dispositions of engaged public work citizenship. Franklin [high school], especially in its prewar heyday, conveyed "civic ideas" and "civic mindedness" across classrooms. The thought that "we would be able to participate in something bigger than ourselves" was a galvanizing sentiment for many Franklin students (p. 257).

These are precisely the dispositions that atrophy when high stakes testing drives such concerns out of the curriculum and when parents as consumers choosing schools replace the notion of empowered citizens holding schools accountable and viewing schools as central community organizations that belong to them. These civic dispositions cannot be reclaimed if school leaders are trained to be entrepreneurs within a marketplace of industry venders and school choice. Venture philanthropists like Eli Broad have used their personal fortunes for decades to successfully promote this entrepreneurial framework for school leaders (Saltman, 2009). It will be up to progressive scholars and courageous leaders in the field to return us to the tradition that Leonard Cavello pioneered. A PAR framework can perhaps be useful in this endeavor.

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Chapter 17
Critical Reflective Practices: Connecting to Social Justice

Christa Boske

Leading for social justice is a highly emotional endeavor requiring courage, integrity, imaginative possibilities, and self-awareness. It is important to also acknowledge the ongoing debate and tensions regarding multiple meanings for *social justice*, what it means to *lead for social* justice, and *pedagogies that encourage and support school leaders to lead for social justice*. The purpose of this chapter is to examine how critical reflection promotes a connective process that precedes meaningful learning centered on a change of self, and ultimately, changing ways of knowing and responding to the world. My voice, throughout this chapter, is that of a school social worker, inner-city school leader, and tempered radical—a marginalized voice missing from debates centered on preparing school leaders for social justice.

Educational leadership is at the center of unprecedented attention. School leaders are often perceived as pivotal players in making systemic changes in the pursuit of equity (Boske, 2011a, 2011b, 2013; Boske & McEnery, 2010; Marshall & Oliva, 2010; Tooms & Boske, 2010). However, for school leaders to have the capacity, willingness, and courage to interrupt oppressive practices, they need to be afforded spaces for renewed discussions, critical self-reflection, and experiential learning centered on broadening, deepening, and enriching their school leadership identity. Such efforts have the potential to provide school leaders with spaces to make shifts in their ways of understanding and responding to those they serve, especially for those who live on the margins (Boske, 2011a, 2011b).

Deepening new ways of understanding and knowing is not an easy process for educators and school leaders. There is a tendency to perpetuate oppressive school practices, because those in positions of power feel pressured to preserve the status quo (Oakes, Quartz, Ryan, & Lipton, 2000). Therefore, the implications of school reform often reproduce rather than transcend societal inequities (Bastian & Greer, 1985).

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Those who serve in school leadership positions should recognize economic, political, and social disparities between Blacks, Latino/as, Native Americans, Asians, and their White counterparts *still* remain consistent in the USA, especially within public schools. Those highest at risk of being marginalized in the USA are Children of Color, who disproportionately live in poverty as compared to their White counterparts. Those who live in poverty often experience significant disparities in the number of resources, quality teachers, pedagogical practices, and rigorous curriculum in their schools (see Orfield & Lee, 2005) and live within urban and rural school communities.

School leaders must also have the capacity to scrutinize the complexities of oppression in order to formulate questions that inquire about *whose* interests are actually served (Marshall & Ward, 2004). These examinations appear rhetorical at best. School leaders must understand the influence of larger cultural/political systems in order to advance social justice issues for *all* students. There is growing concern, however, by scholars preparing school leaders. They question to what extent, if any, school leaders are prepared to interrupt oppressive practices and lead for social justice (Lopez, 2003). Some professors and educational administration programs remain ill-prepared to address issues of equity. Considering the long-term disparities that continue to impact the lives of children and families, standing still is no longer an option for scholars and school leaders to commit to understanding how to lead for social justice in public schools (Marshall & Ward, 2004). There is a need for school leaders to internalize values of equity and justice if they are expected to systemically permeate hegemonic school practices. In order to afford school leaders with spaces to uncover ways to engage in practices aligned with social justice work, they need to engage in critically thinking about the relation of self to others, especially those who live on the margins (Boske, 2011a, 2011b, 2013; Terrell & Lindsey, 2009). By deepening their understanding of power and privilege, they can begin to unpack how systems and individuals who work within these systems perpetuate oppressive practices. These spaces afford school leaders with opportunities to reflect on how their sense of self is essential to developing equity consciousness (Boske, 2011a, 2011b; Boske & McEnery, 2012) and how this deepened sense of self encourages them to apply equity-oriented practical knowledge into practice in order to overcome formidable resistance (Marshall & Oliva, 2010; Theoharis, 2007).

What is at the heart of discussions centered on leading for social justice is the need, willingness, and commitment to improve the lived experiences of those who are marginalized—“Social justice, like education, is the deliberate intervention that requires the moral use of power” (Bogotch, 2002, p. 2). The word *deliberate* is the cornerstone for this chapter. As a former practitioner, I often wonder why those who prepare school leaders tend to overlook the significance of *what* knowledge is shared, *how* candidates learn, and *which* learning is used for the purpose of improving the lives of children and families in schools. These questions are rarely raised during college, department, or program meetings, and when they are raised, there seems to be a *deliberate* attempt to dismiss their urgency. Such experiences encourage me to respond to my colleagues by asking *why have transformative pedagogical practices that encourage a change in self omitted from discussions of leading for social justice in schools?*

I contend the first step to engaging school leaders in social justice work centers on critical reflection of both faculty and school leaders. Why? Faculty choose pedagogies that hopefully promote aspiring school leaders to reconsider the way in which they understand and respond to the world around them, especially for those from underserved populations, and school leaders, because they are in need of spaces to understand and apply their understandings to improve the lives of those who are marginalized. Critical reflection centers on *doing* and *being deliberate*—intentional practices centered on being critically aware of how and why presuppositions constrain the way in which people understand, respond, and feel about the world, in addition to revisiting how such assumptions permit inclusive, discriminating, and integrative perspectives in making decisions or acting on new ways of knowing.

Critical pedagogies offer educators spaces to deepen their understanding regarding the well-being of those they serve—the social, emotional, and ecological places children and families inhabit. This process can be played out in multiple ways, which center on increasing awareness and understanding of the lived experiences of marginalized populations. This deepened understanding includes, but is not limited to, addressing decreasing dropout rates for marginalized children (Hodgkinson, 1999), improving school practices for children receiving special education services (Sapon-Shevin & Zollers, 1999), embracing the lesbian/gay/bisexual/transgender/queer (LGBTQ) community in schools (Bochenek & Brown, 2001; Koschoreck & Slattery, 2010; Koschoreck & Tooms, 2009), eliminating the achievement gap between mainstream and marginalized children (Scheurich & Skrla, 2003), welcoming English language learners and immigrant children and their families (López, Gonzalez, & Fierro, 2005; Moll, 1992; Moll, Amanti, Neff, & Gonzalez, 1992; Portes & Rumbaut, 2006), or promoting gender equity (Klein et al., 1994).

Also essential to this understanding the role of critical reflection and leading for social justice is affording spaces for people to engage in recent debates on what social justice *is*, the *role* school leaders play in leading for social justice, and *how* school leaders will contribute to something larger than themselves to improve the lived experiences of those they serve. Some scholars contend social justice is committing to the moral use of power (Bogotch, 2002), while others believe it fosters critical inquiry (Brown, 2004, 2006) and promotes social action (Marshall & Oliva, 2010; Tooms & Boske, 2010).

As school leaders engage in critical reflective practices, they have spaces to become more aware of long-standing issues of marginalization within US public schools. They may also discover aspects of schooling to which they had previously not attended, such as fundamental structural inequities (Darling-Hammond, 2005; Ladson-Billings, 2006), insufficient school funding (Kozol, 1991, 2006), and lack of highly qualified school personnel within urban and rural communities (Darling-Hammond, 2005). As their awareness increases, so do tensions among their sense of self, school leadership identity, and actions taken. Individuals often utilize these spaces to look within and question to what extent, if any, they perpetuate these lived realities for those they serve (Boske, 2011a, 2011b; Boske & McEnery, 2010; Terrell & Lindsey, 2009).

Throughout the critical reflective process, school leaders recognize how often children and families are exposed to the effects of inequities through the perpetuation of hegemonic school practices, which reproduce and reinforce cultural and educational traditions of White, middle-class, English-speaking, Christian, heterosexual communities (e.g., Gonzalez, Moll, & Amanti, 2005; Marshall & Oliva, 2010; Tooms & Boske, 2010). The impact of social justice and equity issues on the lives of underserved populations is so profound that it often encourages those who prepare school leaders to reconsider how their academic content and pedagogy provide spaces for school leaders to recognize, analyze, and respond to systemic inequities in meaningful and authentic ways (e.g., Boske, 2011a, 2011b, 2013; Boske & Diem, 2012; Boske & Tooms, 2010; Brown, 2004, 2006; Ladson-Billings, 2006; Marshall & Oliva, 2010).

Context Matters

The US educational system has a serious crisis on their hands when considering students who live on the margins do not often have teachers who want to teach, students who seem to avoid learning, to learn, and leaders who are not compelled to address the biases that shape their ways of knowing and responding to underserved populations (hooks, 1994). For many students, their world outside of school is vastly differently from the world promoted within public schools, which often expects students to cross specific borders and align their behaviors as such in order to attain academic success (Alston, 2004). These daily border crossings place students in unknown contexts in which they are expected to navigate what they know, what they do not know, and how they will transition from one context to the other, which often leaves students, especially those from marginalized populations, with school practices (i.e., curricular activities, pedagogy, values, beliefs, assumptions) that are not congruent with their lived experiences (Alston, 2004). Overcoming such perceptions entails a shift in thinking how school leaders are prepared. Addressing issues of social justice is paramount to consciously act on ensuring education is just, democratic, and stressing academic excellence for *all* children (Shields, 2003). Leading for social justice requires school leaders to engage in actions that support the learning of *all* children. Their ability and willingness to disrupt unjust educational practices is critical to interrupting oppressive practices (Marshall & Oliva, 2010).

What is needed are school leaders who engage in realistically confronting the lived realities of those they serve through courageous dialogue centered on the grave injustices perpetuated within schools (Grogan & Shakeshaft, 2010). These injustices include multiple exclusionary practices such as post-Civil Rights era disintegration schooling (Horsford, 2010), decreasing dropout rates for marginalized children (Hodgkinson, 1999), improving school practices for children receiving special education services (Sapon-Shevin & Zollers, 1999), embracing lesbian/gay/bisexual/transgender/queer/intersex/ally (LGBTQIA) communities (Bochenek & Brown, 2001; Koschoreck & Slattery, 2010; Koschoreck & Tooms, 2009), eliminating achievement gaps between mainstream and marginalized children (Scheurich & Skrla, 2003), acknowledging and valuing English language learners and immigrant children and their families (Moll et al., 1992; Portes & Rumbaut, 2006), or promoting gender equity (Klein et al., 1994).

Some school leaders hold onto deeply ingrained and dysconscious racial perceptions, which often deem the existing order of things as appropriate practice. Although school leaders may assert their ideologies have good intentions (Shields, 2003), they often become frustrated and point fingers at underserved populations, perceiving their differences as cultural inadequacies (Terrell & Lindsey, 2009). Because these assumptions and beliefs are so ingrained in how school leaders understand and respond to the world, they often fail to recognize how much they structure and shape personal and professional lives (Tooms & Boske, 2010). Deepening their understanding and considering social, cultural, economic, and political contexts will be essential school leaders to address and improve the educational experiences of historically disenfranchised populations (Bogotch, 2002; Boske, 2010; Boske & McEnery, 2010; Marshall & Oliva, 2010; Theoharis, 2007).

School leaders need to draw on their ability to promote a shared vision and actions philosophically grounded in care and relationships (Enomoto, 1997; Starratt, 1991). Addressing these issues will encourage a change in how teachers and school leaders learn, as well as the need to discover ways to utilize schools as spaces for new thinking and growth (Alston, 2004; hooks, 1994). The urgency to promote critical reflection occurs at a time when US public school leaders face increasing demands to eliminate historical achievement gaps between mainstream populations and children who live on the margins (Hoy & Miskel, 2008). Because of these increased demands, they tend to distance themselves from holistic and humanistic approaches to schooling children, which include human stories—conversations with children, families, and teachers about their lived experiences—and fostering meaningful relations between self and others, especially individuals from disenfranchised populations due to race, class, ability (mental and physical), sexual identity, gender, religion, immigration status, and language (see Boske, 2011a, 2011b; Boske & McEnery, 2012). The time has come for school leaders to redefine, recast, and revise notions of otherness, marginalization, and difference in an effort to promote imaginative possibilities and commit to making it better for school communities across the USA, especially for those who bear the social costs of the present (Grogan & Shakeshaft, 2010; West, 2000).

Contemplating What Social Justice *Is*

Sometimes, conversations about social justice center on the dangers of promoting assimilation models with increasing numbers of Children of Color in public schools or on school policies that fail to serve marginalized student populations due to gender, race, class, sexuality, and ability (Marshall, 1993; Marshall & Gerstyl-Pepin, 2005). And other times, these discussions focus on *which* students are served and the long-standing achievement gap between mainstream and marginalized children in public schools (Apple, 1993; Darling-Hammond, 1997; Marshall & Oliva, 2010). The belief that some groups of children are intrinsically more able than other groups of children because of class, skin color, language, sexual identity, and gender is wrong (Marshall & Oliva, 2010; Shields, 2003). School leadership is a powerful intervening variable in determining whether children from diverse backgrounds are successful or not (Reyes, Scribner, & Parades-Scribner, 1999; Scheurich & Skrla, 2003). Examining what it means to lead for social justice opens up doors and puts up mirrors within schools for leaders and faculty to see, which reflects the cotemporary realities lived by underserved populations.

Exploring how school leaders understand the lived experiences of marginalized populations in schools is central to my research. Some of my research centers on the lived experiences of underserved children and families and how to prepare school leaders to improve their lived experiences. This examination is significant to understanding what it means to lead for social justice, because for marginalized populations, individual choices are limited in US public schools, specifically for those who reside in urban and rural communities (see Kozol, 1991, 2006). Long-standing injustices such as this continue to inspire me as a former practitioner and scholar to commit myself to understanding social justice as an evolving educational construct.

Understanding the significance of context is essential to deepening understanding of what social justice *is*. Although my research as well as the research referenced throughout this chapter originated in the USA, findings are transferable to other settings of comparable demographics/profiles and cultural contexts (i.e., if school is a place where young people and adults explore deep understandings of culture and power and where they recognize and celebrate diversity within the community of difference). Those who prepare school leaders will need to continuously negotiate and renegotiate, as well as construct and reconstruct ways of knowing about community, political ideals, history, leadership, and what is meant by the "social justice" within specific contexts. Social justice, most would agree, attempts to build bridges between individuals, groups, and communities (e.g., Merchant & Shoho, 2010; Tooms & Boske, 2010); however, it is a messy and complex process with overarching principles striving for visibility. In an effort to build bridges with these principles in mind, specific stances will take precedence over others and will play a pivotal role in where, with whom, and for whom they are built. Therefore, conceptualizing universality with social justice leadership may be difficult, because individuals or groups advocate for and from their particular viewpoints, which are often embedded within cultural, political, and societal norms.

Leading for social justice is not only context specific; the process of leading in socially just ways also has implications for how school leaders promote this work—leading in transformative ways. Although some people refer to the terms *transformational* and *transformative* as synonyms, there are subtle, but significant, differences between them. Transformational leadership centers on collective interests of groups (Leithwood & Jantzi, 1990) and places the leader at the heart of shared decision making, fostering consensus, and building a productive school culture that encourages participation in school decisions. Words such as *liberation*, *emancipation*, and *equality* are central to transformative leadership, which focuses on exhibiting value-based leadership (Astin & Astin, 2000), working with others toward higher levels of engagement, and advocating morality, in order to foster social justice work in schools (Shields, 2003). The promotion of such practices often raises issues for faculty to consider, including programmatic climate, ability and willingness to address oppressive practices associated with underserved populations, and commitment to engaging students in transformative work in schools (Boske & Tooms, 2010; Brown, 2004, 2006; Marshall & Oliva, 2010; Tooms & Boske, 2010).

Leaders for social justice need spaces to learn how to make connections among significantly improving students' academic achievement, increase critical their consciousness, and respond to underserved populations by engaging in inclusive school practices (Boske, 2013). As school leaders increase their awareness regarding the lived experiences of underserved populations, they describe a deeper sense of empathy, ethic of care, and willingness to take seriously the need to safeguard democratic practices (Boske, 2011a, 2011b; Boske & McEnery, 2010, 2012). Such efforts not only protect those who live on the margins, but they are essential to transformative school leaders engaging and sustaining social justice and equity work in schools (Kouzes & Posner, 1999). It is along these lines critical reflection has the potential of breaking new ground in understanding what it means for school leaders to lead for social justice. This practice calls for those who prepare school leaders to pay close attention to the sensorial—to understanding how ways of knowing and responding to those who are underserved are critically embodied experiences versus a common set of universally understood assumptions, beliefs, and practices. How school leaders make meaning from their lived experiences, what they do with these new ways of knowing, and how others respond to these new ways of knowing are critical to understanding how school leaders make sense of their world. This inquiry is significant to exploring relationships among critical reflection as sense-making and understanding through the senses, which is similar to recent interests discussed in curriculum studies (e.g., Ellsworth, 2005; Gershon, 2011; Kumashiro, 2008; Springgay, 2008; Urmacher, 2009).

Critical Reflection as Sense-Making

People think and learn through multilayered lived experiences. Because we are storytelling organisms who, individually and collectively, lead storied lives, our ways of knowing and responding to the world are essential to understanding the ways people think and learn. Therefore, critical reflection is central to understanding how school leaders understand how their prior ways of knowing are justified under present circumstances they face in US public schools (see Mezirow, 1990). People's lives and how they are composed are of interest to educators and school leaders as well as those who prepare them to serve in schools. Their inquiry tends to center on understanding learning and teaching, how it takes place, as well as undertaking different beliefs, values, and assumptions within diverse contexts in an effort to find links to learning, teaching, and leading. From this perspective, experience is the starting point for understanding people and their relation of self to others and to their environment (e.g., Dewey, 1934, 1938, 1961).

School leaders and teachers concerned with student learning recognize the need to pay closer attention to the impact of the nation's deepening cultural texture, racial tensions, and increasing percentage of students from historically disenfranchised populations (U.S. Bureau of Census, 2010) and the influence such changes will continue to have on the nation's schools, colleges, and universities (Gay, 2010). Scholars—including Sonia Nieto, Geneva Gay, Jeffrey Brooks, Lisa Delpit, Gerardo Lopez, Patrick Slattery, Michael Dantley, Linda Tillman, and Gloria Ladson-Billings—are concerned about the serious academic achievement problems among children and families who live on the margins. Their underachievement calls for systemic, holistic, authentic, comprehensive, and curriculum transformative interventions in US public schools (e.g., Gay, 2010; Henderson & Gornik, 2007; Sleeter & Grant, 2009). This broad-based and systemic curriculum reform requires deeper and more comprehensive analysis of schools, which needs to be collectively addressed with transformative curriculum leaders who focus on raising consciousness (Burns, 1978; Eisner, 1994; Noddings, 1984). Given these connections, my focus here on questions of equity and access is applicable to some strands in the field that not only focus on questions of teachers as leaders (e.g., Henderson & Gornik) but also, and perhaps more importantly, speak to core questions that remain central to curriculum studies (e.g., Kridel, 2010; Malewski, 2009). In sum, the arguments made here regarding school leaders are simultaneously discussions germane to central questions in curriculum studies.

School leaders are not often prepared to engage in transformative curriculum leadership. Instead, they are traditionally trained as managers of people versus leaders who actively engage in deepening their empathic responses and connections with school communities. This chapter seeks to push at utilizing sense-making and artmaking to afford school leaders with spaces to engage in critical reflection. These spaces afford school leaders with opportunities to understand relationships between their sense of self and leading for social justice through the senses—ways in which school leaders perceive their lived experiences and relation to others.

Sense-making is the process by which school leaders draw meaning from their lived inquiries while engaging in complex reflective processes. One means of encouraging school leaders to deepen their ways of understanding is through artmaking and audio/video technology. These play an essential role in critical reflection, because they are possible tools available that provide school leaders with spaces to construct meaning-making through the senses. Such spaces afford them to deepen their ways of knowing and responding to the needs of those they serve, especially for those who live on the margins due to race, class, gender, and other differences from the mainstream. Because of inherent challenges in preparing school leaders to take a more critically conscious stance toward deepening their empathic responses toward children and their communities, especially with issues centered on social justice and equity (Lopez, 2003; Marshall & Oliva, 2010; Tooms & Boske, 2010), school leaders need opportunities to engage in sense-making, by which school leaders give meaning to their experiences (Brown, 2004, 2006).

Utilizing the senses (sight and sound) encourages school leaders to give *feeling to form* and *form to feeling* (Langer, 1953). As leaders *come to know* and *live their inquiries*, which center on social justice and equity issues facing US public schools, their ways of understanding move from the abstract to the *being* and *living* their ways of knowing. The interconnectedness between the senses affords school leaders spaces to create multiple meanings centering on an evolving school leadership identity. They make connections between what they see, hear, and experience by connecting their emotion-laden experiences through artmaking, directly impacting their ways of *knowing* (Langer, 1982). This sense-making process guides them through a process in which their senses transform their consciousness (Eisner, 2002), deepen their understanding of their beliefs and attitudes toward power, and create spaces centered on an ethic of care through imaginative possibilities (Greene, 1995; Noddings, 1984). Therefore, the real significance of learning appears when school leaders begin to reevaluate their lives, ways of knowing, and pathways to remake them. When school leaders engage in reflection on assumptions and predispositions, especially about oneself, their sense-making may lead to transformative learning of self (see Mezirow, 1990).

Programs that emphasize the need for sense-making as a pathway toward transformative leadership require school leaders to engage in critical thought and reflection. This critical reflection emphasizes the need to look within and examine personal beliefs, lived experiences, and cultural identity. School leaders build the capacity to deliver policies and practices that address the lived realities of disenfranchised populations. Sometimes, such transformations include addressing disparities facing Children of Color, school policies that fail to serve marginalized populations (Marshall, 1993; Marshall & Gerstyl-Pepin, 2005), or long-standing achievement gaps between mainstream and marginalized children in US public schools (Apple, 1993; Darling-Hammond, 1997; Marshall & Oliva, 2010).

School leaders who lead for social justice need must come to better understand how to interrupt practices that perpetuate the belief that some groups of children are intrinsically more able than other groups of children due to class, skin color, language, sexual identity, or gender (Shields, 2003). In light of this, the leader in training should be made aware of leadership as a powerful intervening variable in determining whether children from diverse backgrounds are successful or not (Reyes et al., 1999; Scheurich & Skrla, 2003). Such practices encourage faculty to reconsider how programmatic decisions influence curriculum content and pedagogy to foster transformational experiences for school leaders (see Boske & Tooms, 2010). One means of promoting the courage and skill set necessary to sustain social justice and equity work in schools is to provide them with safe spaces to reflect on the impact of sense-making on their school leadership identity.

Although school leaders make meaning from engaging with their environments, those who prepare school leaders have not considered to what extent the senses (i.e., sight, smell, sound, taste, and touch) influence how they understand the influence of the senses impacting community norms, attitudes, and values as preferences. The way school leaders make sense of their environments is derived from these senses, which are embedded throughout school practices, curriculum, pedagogy, and policy. Therefore, sense-making can be understood as a political act, engaging school leaders in assuming that what makes sense to them is but one possible interpretation among a myriad of possibilities.

There is an urgency to deepen understanding regarding how to create spaces in which school leaders promote and address issues of social justice and equity in US public schools. This increased attention is aligned with arts-based principles centered on understanding sensory ways of *knowing*. Artmaking is recognized as an experiential mode of inquiry that reveals insights and ways of understanding that impact our capacities for knowing (e.g., Cahnmann-Taylor & Siegesmund, 2008; Dewey, 1934; Eisner, 2008). Utilizing artmaking for *making sense* of our lived experiences through sensory exploration creates spaces for school leaders to consider their actions and reflect upon their impact (e.g., Ellsworth, 2005; Springgay, 2008). Understanding sense-making as an essential component of critical reflection is significant to furthering the extant literature because it examines ways of understanding through the senses. Specifically, it does so through the use of auditory and reflections in an effort to create spaces for school leaders to shift their sense-making from text to audio/visual artmaking—a formal curricular decision grounded in the recognition of rich meanings and imaginative possibilities embedded in non-text-based, sensual understandings.

Leading for Social Justice Through Bridge Building

Limited extant literature centered on building bridges (i.e., Culbertson, 1995; Tooms & Boske, 2010) alludes to an epistemology in which leaders understand their work as connecting spaces among people, community, and school. Building bridges finds its roots across disciplines including, but not limited to, social and political sciences. The work of Jane Addams (1911), a social worker who opened the Hull House in Chicago, Illinois, in 1889, professed the need for bridge building between those in positions of power and those from impoverished neighborhoods. She contended these bridges were essential to empowering those who lived on the margins through social networking. Furthermore, bridge leadership has roots throughout the Civil Rights era. Grassroots organizations worked diligently to create ties between the community and the social movement for the purpose of transformation. Men and Women of Color worked collaboratively to evoke community, justice, and voices often silenced within the political mainstream. For Jane Addams and civil rights leaders, these bridge-building efforts were transformative stepping stones. Together, they bridged the lived realities of disenfranchised populations and those in positions of power and privilege. These early efforts of bridge leadership utilized formidable barriers between their personal lives and public life as members of organizations to challenge existing relationships with local, state, and societal institutions in the name of social justice.

The urgency to promote bridge leadership comes at a time when US public school leaders face increasing demands to eliminate historical achievement gaps between mainstream populations and children who live on the margins (Hoy & Miskel, 2008). These increased demands place school leaders in spaces in which they are asked to focus on standardized testing, annual yearly progress, and test-taking strategies versus building meaningful connections within the school community. In an effort to pay closer attention to increasing student performance, US school leaders tend to distance themselves from holistic and humanistic approaches in order to meet the needs of those they serve. These needs include what I contend is at the core of leadership—human stories (Boske, 2011a, 2011b). I define human stories as conversations with children, families, and teachers about their lived experiences. These interactions have the potential to foster authentic, meaningful relations between self and others. This is especially critical when considering how to build bridges between self and individuals from disenfranchised populations.

I assert school leaders will need to reconsider how they define, cast, and understand notions of otherness, marginalization, and difference in an effort to promote bridge building. Those who engage in bridge building will need to shift thinking of bridge building as an internal, private, or individual endeavor toward a public movement. Therefore, promoting bridge building as a public movement affords school leaders with opportunities to nest ideas, relations, and actions beyond rigid school community boundaries (Boske, 2013). These new ways of knowing suggest bridge building is a public movement affording people with spaces to collectively attend to imaginative possibilities and commitments. Such efforts encourage leaders to make schools better places for children, especially for those who bear the social costs of the present (e.g., Grogan & Shakeshaft, 2010; West, 2000).

Despite rising standards for excellence and equity, increasing demands on teachers and school leaders, and the push for schools to achieve equal educational outcomes, US public schools are still more racially segregated today than during *Brown v. Board*. Furthermore, public schools have not eliminated long-standing achievement gaps that tend to silence those who live on the margins due to race, class, gender, religion, immigration status, ability (both mental and physical), family structure, and sexual identity (Kozol, 2006; Marshall & Oliva, 2010). Given US schools continuing pressure to serve increasing culturally diverse populations, school leaders will need the knowledge, skill set, and courage to engage in culturally responsive practices that reject color-blind and oppressive ideologies (i.e., Boske, 2012, 2013; Furman & Shields, 2005; Gay, 2010; Shields, 2003; Tooms & Boske, 2010).

School leaders are traditionally prepared to be managers of systems rather than advocates engaging in practices that deepen empathic responses that make meaningful connections with school communities. School leaders who engage in leadership practices embedded in leading for social justice or promoting equity are referred to as transformative leadership (Shields, 2003). These leaders conceptualize leading for social justice and equity-oriented work as more than resistance. Those compelled to making meaning connections between self and others center on liberation, emancipation, and social justice (e.g., Brown, 2004, 2006; Shields, 2003).

Conceptualizing bridge leadership encompasses a myriad of perspectives ranging from (a) engaging in cross-disciplinary and subdisciplinary boundaries to (b) creating spaces in which all stakeholders come together, to (c) internalizing school leadership qualities and dispositions rooted in the commitment to improve the education of all children (Merchant & Shoho, 2010), to (d) embarking on a conceptual exploration for educational administrators and scholars (Culbertson, 1995), to (e) building the capacity for school leaders and communities to work together to improve teaching and learning, and to (f) sharing chronicled narratives of scholars conducting bridge-building work across international contexts within the field of educational leadership (Tooms & Boske, 2010), to creating a common language to forward educational leadership theory. Despite scholars' intentions to center their inquiries on bridge leadership, there are limited spaces for vigorous dialogue and empirically validated conceptual models. School leaders and professors might rethink bridge leadership as an epistemology in which all school community members (i.e., children, families, community members, teachers, and school leaders) understand communal work as being rooted in authentic, meaningful storied connections between people and the spaces in which they live.

School leaders might want to consider experience and meaning-making as a continual process of questioning ways of knowing, the way in which knowledge is constructed, evaluated, and used (Boske, 2012, 2013; Cochran-Smith & Lytle, 2009). Building bridges centers on understanding learning and teaching. It also emphasizes the need to reconsider how to build bridges when considering different beliefs, values, and assumptions within diverse contexts. The goal of building bridges centers on discovering links between learning, teaching, and leading. Recognizing experience as the starting point for understanding bridge leadership for school leaders and their relation of self to others and to their environment is central to broadening understanding of this working concept.

Bridge building connects self and others. It is duo directional, because the process encourages school leaders, faculty, and communities to facilitate authentic responses among self, school, and community. Throughout bridge building, relationships are nonhierarchical, which suggests one group does not possess more power than another. Together, groups work diligently to uphold democratic practices, honoring the rights of those they serve and advocating for those who have been silenced. Bridge builders work collectively to respond authentically to the needs of children, community, and school. Those who construct, extend, and sustain the bridge are committed to meeting the needs of the community at large.

The strength of the bridge depends on an individual's ability, willingness, and capacity to empathically respond to making schools better places for all children. To do this requires bridge builders to rethink what it means to authentically make connections between self and others and to meet the needs of the community through collective meaning-making. This process involves the creation of spaces in which members deepen their ways of knowing and responding to the world. The concept of meaning-making builds on fields such as anthropology, sociology, and other social sciences. At the core of meaning-making is the belief people constantly seek to understand the world around them. The imposition of meaning-making functions as a site of contestation—the moral understandings of what is right and wrong, true and false, what is alike and different, as well as social understandings of identity and difference, what is deemed attractive and appalling, and any other understandings to identify meaning-making.

This collective action informs bridge builders' values, beliefs, and purpose for their work in schools. Therefore, the act of bridging reframes the work done in schools by using bridges as opportunities for personal, school, and community growth. Engaging in bridge building relies heavily on the concept for collective actions, collective identity, and collective understanding for empowerment. The bridge affords builders with a sense of their surroundings, what their surroundings mean, the influence of the structure, and how the structure affords multiple worldviews. Building bridges affords people the capacity to enhance the way in which people understand, build upon, and improve the lived experienced of others. This concept suggests building bridges is ever changing. It is a process that is available to function as a social movement. That is, from the point of a bridge builder, the way in which their collective actions make sense and are shaped by the ideas of the organization, its members, and larger context that are meaningful within a given situation.

Bridge building may be of particular interest to those interested in understanding collective meaning-making, extensions of self and others, and developing meaningful connections as a process that foregrounds resistance to the dominant norms or ways of being (Boske, 2012, 2013; Tooms & Boske, 2010). Those involved in the process may raise questions about the capacity for imaginative possibilities including alternative ways of knowing and doing in schools. These bridges offer spaces to challenge builders to rethink meanings, interactions, and ways of knowing that are often taken for granted. This suggests bridge building is a social movement, a way to engage school leaders, communities, and faculty in actively making meaning to challenge established meanings, ways of knowing, and ways of responding, especially toward marginalized populations (Boske, 2012, 2013).

The bridge suggests the need for building a new generation of scholars and practitioners toward a social movement. Such efforts encourage dual loyalties to both the field of educational leadership and activism in schools. It is therefore perceived as a social action or public movement. School leaders, teachers, and faculty, who have the capacity to function as bridge builders, are in pivotal positions to engage local communities, marginalized populations, and organizations in emerging as intensified movement centered on issues of justice (Boske, 2013). Their personal histories are vital to understanding the repercussions of their wakefulness. Their emotional responses are critical to deepening empathic responses and moving in ways that are authentic and meaningful. How school leaders and those who prepare them understand the complex process of identity formation influences how individuals come to understand the world and build a unique constellation of lived experiences that thematically link their ways of knowing and responding across issues such as race, class, gender, and otherness. Their narratives play a critical role in understanding the construction and reconstruction of their lived realities. Bridge building urges those who engage in this type of work to increase their consciousness, their wakefulness, and their awareness of cultural, historical, economic, and political contexts. They become catalysts interested in utilizing their new ways of knowing and responding to make transformative changes in schools (Boske). Bridging emphasizes the need for those who lead to be aware of the power of story selves, and how stories give voice, and, in some cases, silence nameless others who have impacted the way they see the world. The position here is that there is an inherent logic, ideal, and purpose in bridge building. The process involves transforming frames of reference through critical reflection, bridging, and sense-making.

Sense-Making and Leading for Social Justice as a Catalyst

How we think and learn through multilayered lived experiences. Because people are storytelling organisms who, individually and collectively, lead storied lives, our ways of knowing and responding to the world are essential to understanding the ways people think and learn. My current research centers on school leaders' notions of making sense not only centers on deepening understanding of sensory exploration, they also engage in actions aligned with revelations from their reflective processes (Boske, 2012). These new responses encourage understanding the interconnectedness between sense of self, school practices, and impact of responses (Schön, 1983). Understanding the implications of this reflective process ranges from using text as a way of knowing to understanding the significance of sight and sound to deepening their beliefs as school leaders. These spaces serve to uncover the influence of lived experiences as well as marginalized voices through storytelling (Barone, 2002). The process functions as a release, promoting imaginative possibilities centered on understanding their role in interrupting oppressive school practices (Greene, 1995). In these ways, sense-making pushes students' rigid conceptual boundaries of what it means to lead to understanding how their senses influence their ways of knowing, recognizing structural inequities, and ability to challenge cultural and educational superiority of the dominant culture (i.e., White, middle-class, English-speaking, Christian, heterosexual communities) to interrupt oppressive school practices (Gonzalez et al., 2005; Marshall & Oliva, 2010; Tooms &

Boske, 2010). The impact of sense-making transforms their school leadership identities from narrowly defined roles, attitudes, and beliefs to new ways of knowing and responding to the world, especially for underserved populations.

My current research centers on understanding the intersections of critical reflections, sense-making, and school leadership identity encourage school leaders to identify themselves as catalysts to actively engage in improving the lives of underserved populations. This process-oriented growth model builds on extant literature centered on promoting social justice (e.g. Blackmore, 2002; Bogotch, 2002; Dantley, 2002; Larson & Murtadha, 2002; Marshall & Oliva, 2010; Marshall & Ward, 2004) and examines the degree to which school leaders embody new ways of knowing and responding to those who live on the margins by measuring the impact of lived experiences, which are embedded within social justice-oriented work. What emerged from my current research (see Boske, 2012) was the significance of school leaders internalizing themselves as catalysts who developed the capacity, ability, and determination to interrupt oppressive practices within their school districts. School leaders understood the impact of repressive conditions on their ability to promote such work and the need to transform themselves and practices in a critical sense (Kincheloe & McLaren, 2005; Lather, 1986). The process of employing a catalytic perspective began with school leaders who believed social justice and equity *were* possible and that their journey toward engaging in such work began from within. This comprehensive critical reflective process transformed school leaders' sense of selves from managerial roles to advocates, to activists, and to catalysts for systemic change. I named this self-transformation as internalizing a *catalytic perspective.* The naming suggests this process employs a self-examination that offers new ways of understanding and responding to the world all in an effort to align continuously evolving school leadership identities with social justice work.

The degree to which school leaders deepened their understanding of self and ways in which they experienced these transitions was essential to their reflective experience and transformation. Developing a catalytic perspective was a continuous process. School leaders renewed their leadership identities through actively engaging in social justice work in schools. This holistic growth-oriented process encouraged school leaders to cultivate new multidimensional school leadership identities (see Terrell & Lindsey, 2009).

The process of undergoing self-transformation is rooted in scholars such as Jack Mezirow (1990, 1991, 1997, 2000), who conceptualizes critical reflection as knowledge. He focuses on the need for transformative curriculum, which centers on *how* decisions are made, emphasizing the need for learning to center on self-understanding, social reconstruction, and engaging in pedagogical actions that reconceptualize school practices. Margaret Wheatley (2006) also offers a lens for understanding transformation by describing the creation of new identities through an intimate engagement with *disorder*. This disorder emphasizes the need for catalysts in order to establish *new* order, which, in this case, is deemed necessary to awaken imaginative possibilities. Furthermore, bell hooks (1994) also asserts people as catalysts "confront one another across differences means that we must change ideas about how we learn; rather than fearing conflict we have to find ways to use it as a *catalyst* for new thinking, for growth" (p. 113). And Patti Lather (1986) emphasizes *catalysts* serve as a lens to understanding the validity of meanings in human interactions.

These ways of understanding suggest *catalysts* have the potential to be the indicators of personal transformation. Because school leaders identified their lived experiences as *catalysts* (Boske, 2011a, 2011b), they are, in turn, inherently valid. The catalysts served as spaces for school leaders to "retell" their newly lived experiences through both reflective and reflexive experiences. The "retelling" or "restorying" of their school leadership identities indicated a transition from old school leadership identities to newly shaped school leadership identities. Because identities are shaped by how school leaders interpret and internalize their catalysts, school leadership identities can be understood as being constructed within a story-shaped world (see Boske, 2011a, 2011b). This understanding supports the notion that school leaders' lives are also storied and narratively constructed, emphasizing the need for school leaders to deepen their understanding of the interconnectedness between their professional identities and their work toward promoting social justice and equity in schools.

Concluding Remarks

One defining condition of being human is the process in which we come to understand our world through experiences. For some school leaders, we learn to make individual interpretations versus acting solely on the purpose, beliefs, and judgments of others—which frame a reference for understanding, meaning-making, and bridging oneself with those we serve. It is precisely through this complex integration of sense-making, self-transformation, and catalytic perspectives we come to understand what it means to embody critical reflection. Such spaces afford school leaders with opportunities for critically questioning and interrupting assumptions, beliefs, and practices centered on leading for social justice. In doing so, critical reflection work replaces the *doing* of traditional school leadership managerial work with *being* sensual. This new focus stresses to explore what seems most familiar with new lenses that render renewed visions and imaginative possibilities. Critical reflection is essential to expanding a school leader's self-consciousness, basic worldviews, and specific capacities of self for transformation. Through this process, school leaders begin to explore what it means *to understand*, *to become*, and *to know* social justice work.

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Chapter 18
Projects from the Heart: For Educational Leaders

Lourdes Diaz Soto

May we do work that matters (Anzaldua, 2005, p. 102).

Introduction

Projects from the heart (Soto, 2010) are transformative projects with ameliorative intentions. Projects from the heart are capable of leading to social justice and moving away from oppression and becoming living testimony as the practice of freedom. The purpose of this essay is to provide examples of projects from the heart with related theoretical underpinnings while highlighting sister fields that have taken up the work of decolonizing and reconceptualizing in order to move closer to the work of social justice.

Taking an opportunity to reconceptualize and decolonize, a field can be challenging and can appear insurmountable. However, when transformative projects and imaginative possibilities are respected, the possibilities are endless. Several fields including early childhood education (see Chap. 60 by Nicholson, this volume) and social work (see Chap. 17 by Boske, this volume) have reflected and taken stock of their current condition in order to highlight the need for projects reflecting social justice. Social work has been at the forefront of the project by infusing its mission and ethics statements and by its willingness to work collaboratively within community.

The field of social work (Denzin 2002) has taken up this work of reconceptualizing on behalf of social justice. The field is clearly intent on ameliorative intentions. The primary mission of the social work profession is to enhance human wellbeing and help meet the basic human needs of all people, with particular attention to the needs and empowerment of people who are vulnerable, oppressed, and living in poverty.

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An historic and defining feature of social work is the profession's focus on individual wellbeing in a social context and the wellbeing of society. Fundamental to social work is attention to the environmental forces that create, contribute to, and address problems in living.

An excerpt from the Code of Ethics of the National Association of Social Workers states in part

> Social workers promote social justice and social change with and on behalf of clients. 'Clients' is used inclusively to refer to individuals, families, groups, organizations, and communities. Social workers are sensitive to cultural and ethnic diversity and strive to end discrimination, oppression, poverty, and other forms of social injustice. These activities may be in the form of direct practice, community organizing, supervision, consultation administration, advocacy, social and political action, policy development and implementation, education, and research and evaluation. Social workers seek to enhance the capacity of people to address their own needs. Social workers also seek to promote the responsiveness of organizations, communities, and other social institutions to individuals' needs and social problems. (Approved by the 1996 NASW Delegate Assembly and revised by the 2008 NASW Delegate http://www.socialworkers.org/pubs/code/code.asp)

The mission of the social work profession is rooted in a set of core values. These core values, embraced by social workers throughout the profession's history, are the foundation of social work's unique purpose and perspective:

- Service
- Social justice
- Dignity and worth of the person
- Importance of human relationships
- Integrity
- Competence

This constellation of core values reflects what is unique to the social work profession. Core values, and the principles that flow from them, must be balanced within the context and complexity of the human experience.

For the field of early childhood education, Soto and Swadener (2002) shared the struggle:

> As we begin to leave the scientifically driven epistemologies as the grounding for early childhood education, we can begin to pursue more personal, liberating, democratic, humanizing, participatory, action-driven, political, feminist, critically multicultural, decolonizing perspectives. How we summon our imaginations to formulate, envision, and implement a liberating praxis that integrates theoretical understandings, critique, and transformative action will help determine what happens to young children growing up in a postmodern context. As we begin to recognize that ours is a struggle toward humanistic and emancipatory goals, we can also begin to chart a path of solidarity that, as Paulo Freire (2000) noted, is dialectical, moving from action to reflection and from reflection to new action. (pp. 51–2)

Relations to Educational Administration

The question here is how do these political, ethical, and aesthetic core values relate to the field of educational administration? In a historical overview of educational administration since the 1960s, Oplatka (2008 and Chap. 2, this volume) identifies salient periods and scholars who have contributed to the field's inquiry, theory, and practices. The 1960s is portrayed as a time when the social sciences and their accompanying methodologies were glorified. In the 1980s, there was a call for attention to more educational topics and an expansion of the field's boundaries. The 1990s brought topics such as policy studies, learning and teaching, and leadership helping the field to define its purposes more clearly. Nevertheless, Oplatka concludes, "Fifty years of scholarly writing and the many dusty periodicals reviewed show we have not removed many of the field's stumbling blocks (p. 28)."

Hart (1999) claims that perhaps "those who work with and study the children of others will never be able to be revolutionary, but will continue to care deeply about educational outcomes… (p. 333)." With all due respect, I would like to add, that at this historical moment, caring is not enough! What we are calling for is transformative, public, and critical professionals who can continue to better the human condition.

> In my view, the current battle about how to prepare student for life in the twenty first century revolves around question of the degree and significance of human differences, whether change or stasis is the natural state of society, and to what extent struggle shapes the course of human events (Rosaldo, 1993, p. 224).

Bogotch (2000) shared his vision for educational leadership as "a deliberate intervention that requires the moral use of power (p. 2)." He challenged the field to integrate social justice as an integral part of the practices of educational leadership, while Marshall's (2004) introduction to a special issue of the *Educational Administration Quarterly* challenged the field to take an activist and prosocial stance. She stated, "Traditional training for educational leadership reflects a culture that has marginalized issues and concerns of social justice (p. 4)." Theoharis (2007) argued that the social justice leader goes beyond good leadership by recasting good leadership as "leadership for social justice." For some of us, rethinking and reconceptualizing the field of leadership in this manner with ameliorative intentions can only help to enhance, if not also transform, leadership projects.

Theoharis found that the principals related that preparation programs did not help them to understand how to lead for social justice. Similarly, Brown (2004) observed that current models of preparation are not able to prepare educational leaders "who are conscious of and committed to diminishing the inequities of American life (p. 81)." Brown recommended alternative approaches focused on skill and attitude development based on a tripartite theoretical model. Relying on Henry Giroux and Christine Sleeter, she maintained that "[t]hese are transformative intellectuals who are both active, reflective scholars and practitioners who engage in political interests that are emancipatory in nature" (p. 99). While it is evident that the educational leadership scholars highlighted here have not been afraid to cite multiculturalists and curricular theorists, the same cannot be said for critical theorists, curricular inquirers, special educators, early childhood educators, and others outside of educational leadership who fail to cite educational leadership. How might we – all educators – begin to learn from one another inside education? How might we immerse ourselves in "borderlands" activities?

One suggested way comes from Gloria Anzaldua:

> Necesitamos teorías that will rewrite history using race, class, gender and ethnicity as categories of analysis, theories that cross borders, that blur boundaries – new kinds of theories with new theorizing methods (Anzaldúa, 1999, p. 25).

Symbolically, the borderlands represent a third space that begins to inform our work as educators. As educational colleagues in the borderlands, we begin to view the larger sociocultural perspectives and provide our sister fields with possibilities that we may not have dreamed about before or on our own. The idea here is to revisit our "dreamspace of social justice and equity" because it matters not what our specialized fields may be, but rather what matters is our work on behalf of learners in societies.

In 2007, I asked,

> Can we envision an early childhood education that is liberating, anti-racist, feminist, critical and revolutionary? We can no longer afford to allow the sacred Western lenses to "govern our very souls". Our experimental and newly evolving paradigms will mean that we are traveling creative paths, as architects, as builders, as wisdom keepers, as healers who discover build and chart newly liberating spaces of hope and possibility. … Only when we dream our dreams in solidarity will our with multiple voices will diverse children, families, and communities experience social justice and equity in our lifetimes. (Soto, 2005, p. 208)

Shields (2004) acknowledged the complexities faced by educational leaders and proposed a transformative leadership model based upon dialogue and strong relationships that afford children opportunities for learning in socially just and democratic communities. She observed how the "blame game" and essentializing "others" have led to pathologies of silence. She called for acknowledging the wide variety of lived experiences. Citing Astin and Astin (2000), Shields emphasized how transformative educational leaders "believe that the value ends of leadership should be to enhance equity, social justice, and the quality of life (p. 11)."

My reading the "word/world" (a la Freire), as a scholar in a sister field, is that leaders and early childhood educators are exploring similar territory and that as the poet reminded us, we can organically build our road as we are walking on it:

> "Caminante, son tushuellas el camino y nada más;
> caminante, no hay camino, se hacecamino al andar."
> Antonio Machado, "Cantares."
> http://www.poemhunter.com/poem/cantares/

We face formidable challenges, yet we are clinging to outdated and unrealistic constructions of representations within an elitist western canon, while at the same time, we are beginning to notice multiple forms of oppression, issues of power, and the politics of our fields. There is ample evidence that decades of western ways of seeing the world have not led us to a more peaceful society. "How we address our concerns … will determine the kind of world we create".

Is social justice and educational administration mutually exclusive? Karpinski and Lugg (2006) ask this question and comment:

> Contemporary educational administration seems almost rife with concern for issues of social justice. In hope of ensuring better academic and social outcomes for all students, today's principals, superintendents, and especially researchers are exploring the historically

> neglected issues of race, ethnicity, religion, sex, gender, sexual orientation, dis/ability, and class as they relate to the welfare of children and their public school experiences. (p. 278)

Yet they also note that educational administration has historically been at odds with social justice if not totally in direct opposition. They recount the struggle of J. Rupert Picott who embraced social justice, while his colleagues clung to Ellwood P. Cubberley and other "founding fathers." Cubberley (1919) himself is cited as stating that "one bright child can be worth more to the National life than thousands of those low mentality (cited in Karpinski & Lugg, p. 279)." The goal of "leading for social justice," Karpinski and Lugg note, is a departure from the history of a profession that clung to hierarchical and business models. J. Rupert Picott demonstrated courage while working during the Jim Crow, Virginia, thereby disrupting the Cubberley model. He became a true leader for educational equity and an advocate for justice. He developed a network of allies in both the African American and Anglo American communities. The legacy of managerialism and the current calls for accountability and economic competitiveness will certainly challenge proponents of social justice and equity today, but is it a greater challenge than what J. Rupert Picott faced?

Our willingness to cross boundaries leads us to a brilliant piece by Blakesley (2010) who exemplifies the possibilities for educational administration research (and other fields) as it draws away from Eurocentric conceptions that have limited the roles that gender, race, and culture play in leadership. Blakesley relies on storytelling as an insightful tool for understanding the indigenous Yukon context. He demonstrates hope for what he refers to as a dynamic field as he recounts how identity has been marginalized in educational leadership programs that have emphasized management and administrative aspects. Citing Murphy (2002), we can understand how school leaders have been miseducated at research universities that have constructed programs at the "warehouse of academe" (p. 16). Examining the transformative nature of learning, Blakesley cites Mezirow, Freire, and Brookfield, adult education scholars, who have contributed to our understanding of transformative learning. The storytelling tool used in this study reveals a method of reaching spaces of transformative liberation that may serve as a guide to the field.

As educational scholars continue the journey of crossing borders, we can find inspiration in Patti Lather's (1991, 1993); (Lather and Smithies, 1997) impressive scholarship, demonstrating the idea that social and educational inquiry can have ameliorative intention. She has taught us that as inquirers, we can contribute to improving people's existing and future lives. As scholars, we can no longer afford to sit as ossified mannequins and limit ourselves to speaking to other professionals. Our silence will only support the continued draconian neoliberal and global hyper capitalistic policies that are impacting learners' and families' daily lived reality.

Examples of Projects from the Heart

What will it mean if we move from ameliorative to transformative projects? What challenges will we encounter?

In Nashville, Tennessee, scholars crossed borders to a community action research project with a nonprofit human service organization that blended ameliorative and transformative approaches. The ameliorative project focused on intervention with families and individuals while the transformative project moved to include systems in the community affecting personal, interpersonal, and collective wellness. These scholars model for us both the ameliorative and the transformative aspects so that we, too, may begin to reconceptualize schooling that meets both needs of individuals and also includes a more macro perspective of community needs (Evans & Hanlin, 2007).

Within the field of school leadership, Radd (2008) described research dilemmas she encountered while analyzing the data from observations, reflections, memos, and interviews conducted with school leaders who led with a social justice agenda. This study highlights the need for inclusivity in theoretical orientations as the researcher began with a Marxist lens and found that Dewey's pragmatism was also helpful in analyzing the data. The analysis demonstrated that the leaders interviewed were committed to anti-oppression, supportive network with like-minded allies for decision making, and the effective leaders saw themselves as leaders with agency. Even when school leadership is reduced to technical tasks and managerial duties, the "school leaders for social justice can and must imagine and use methods that engage our most deeply held ideals for human connection, interaction, and learning (p. 285)."

Elements of Projects from the Heart: A Critical Genre

Neutrality and objective perspectives no longer serve a complex context that is increasingly demonstrating its inhumanity. Remembering Howard Zinn's documentary, "You can't be neutral on a moving train" (June, 2004), may help us to reconsider our current situation. Who stands to benefit from so-called "objective" stances that do not voice the indignation about the current state of education (or lack thereof), the demonization of educators, micro–macro racist projects, marginalization of "others," and increased profits for the "haves" with blatant poverty for everyone else? Who will continue to line the dusty shelves of our libraries with their scholarship and who will you take up the courage to ameliorate, eliminate, and transform oppressive dehumanizing situations?

Transformative projects, projects from the heart, are those that can improve the human condition for our learners, teachers, and families. By pursuing issues of social justice and equity, human rights, families' well-being, we can begin to present a differing perspective of daily lived realities. Bell Hooks noted, "The moment we choose to love, we begin to move against domination, against oppression. The moment we choose to love, we begin to move toward the freedom to act in ways that liberate others and ourselves. That action is the testimony of love as the practice of freedom" (p. 163).

Our critical genre continues to move away from paradigms that have encouraged the objective, the essentializing, the distant, and the abstract. Ruth Behar (1996) in her book (from the field of anthropology) describes the process and projects that helped her to recognize what it means to be a vulnerable observer and how to deal with anthropology that breaks your heart: “Call it sentimental, call it Victorian and nineteenth century, but I say that anthropology that doesn’t break your heart just isn’t worth doing anymore” (p. 177). These “critical genre,” “projects from the heart,” involve deep transformative processes which include our (a) ethics, (b) self-conscientization, and (c) the struggle with ideology. These three areas are paramount in this historical context if we are serious in our quest for social justice. First, our ethics is a component of solidarity comprised of our basic moral compass, our better nature, that leads us to choose this profession in the first place. Secondly, Freire’s (2000) notion of self-conscientization helps us to examine our privileged existence as scholars, our world view, an honest intention to better understand the world and the word, and to move beyond our colonized minds. Finally, the struggle with ideology, in our present historical context, can guide us to see beyond mean-spirited draconian agendas and thereby pursue the betterment of the human condition.

We can rely on theories that include solidarity and social action in liberating collaborative spaces. In the past, I have called on teacher educators (Soto, 2009) to extend social action projects that include community within a framework of participatory action research. More specifically, I share the evolution of what I term “critical emancipatory mezcla (hybrid) praxis” as well as accompanying examples of several hope-filled projects graduate students and I have pursued over a span of 8 years in New York City and Texas. The idea of mezcla (hybrid) can also be related to Kincheloe and McLaren’s (1994) descriptions of “bricoleurs” as we carefully choose a mix of methodologies and analytical tools to make sense of our work. “In the active bricolage, we bring our understanding of the research context together with our previous experience with research methods (p. 317).” This is a reflexive process that includes not only looking at ourselves in the roles of researchers and practitioners but also in an equitable dialogue with community.

Affording opportunities for the practice of freedom within the context of teacher education and educational administration can lead to projects that are humanizing while at the same time reaching for Freire’s (2000) notion of concientization (consciousness raising). This means engaging in continued, deliberate, consistent, persistent praxis helping educational-social action projects to emerge from a feminist decolonizing perspectives that respect existing linguistic-cultural-socioeconomic traditions of our community members.

Remembering

In this section, I will relay projects that my students and I have designed and implemented with social justice as our focus.

In Austin, Texas, my graduate students and I embarked on a journey that led to the publication entitled “The xicana sacred space: a communal circle for educational researchers” (Soto, Cervantes-Soon, Villareal, & Campos, 2010). For us, the Xicana Sacred Space functioned as a decolonizing tool capable of displacing patriarchal and Western linear notions of research. We found the ability to reclaim indigenous ways of knowing while working in conjunction with the mestiza consciousness (Anzaldúa, 1999). The piece explained how the Xicana Sacred Space evolved in a higher/teacher education context and held possibilities as a method or tool in participatory action research. Our experience taught us about the importance of Freire's (2000) notion of conscientization and Delgado Bernal's (2002) notion of cultural intuition. We also learned about the importance of examining positionalities/standpoints as well as how to strengthen scholarship among those of us interested in conducting decolonial, emancipatory, and feminist research. Anzaldúa's call for new theories with new theorizing methods was the starting point for our journey.

This feminist epistemology examines the influence of border crossing issues on immigration and migration, language, and power. It validates the mestiza consciousness of living in hybrid cultures, races, languages, and spiritualities while navigating competing powers. In the same way, scholars interested in working with communities can place the particular community at the center as experts of their own experiences. Our society can no longer continue to choose stereotypical children's identities, as hybridity becomes the norm.

In the "Xicana Sacred Space," we propose that the idea can be used by others as a collective pedagogical tool or research method. Inserted into projects with emancipatory and decolonial intentions, the xicana sacred space may lead to powerful possibilities. Resembling indigenous circles (Smith, 1999), the sacred space displaces androcentric and Western, linear notions of research, reclaiming indigenous and organic ways of knowing. This has been our idea of a collective third space that can have ameliorative intentions. Gloria Anzaldúa and Cherrie Moraga (1981) elaborated on the emergence of a third space feminism in which there is a "diversity of perspectives, linguistic styles, and cultural tongues" (p. xxiv). This third space has a decolonizing goal capable of raising conscientization (a la Freire) embraces hybridity and unites forces against oppression.

In New York City, my students and I found that one of the more blatant examples of the need for social justice was the catastrophic incident of 911. This became a moment where graduate students and I were teaching in New York City (Soto, 2005) and had to move beyond transformative intellectuals to becoming transformative healers. In our Freirian seminar, we relied on Freire's (1985) idea that "to transform the world is to humanize it." We struggled with the curriculum, with children's depictions of 911, and teacher narratives. The space of transformative healers integrated the complexities of the self which included the intellectual, the emotional, the physical (the body), and the spiritual nature of our own beings. This space required that we reach out to each other, to ourselves, and to others in a moment of love and compassion. The teachers were summoned to engage their courageous wisdom to deal with the tragedy as it affected themselves, children, and the local and international communities. Their deep love and compassion helped them to best meet the needs of the children they were teaching every day in their classrooms.

Most of this work has included "projects from the heart" especially when working with young children (Soto, 2002; Soto & Garza, 2011; Soto & Lasta, 2005). The first modest slice of work took place in Steeltown, PA, where 13 young children drew pictures and described their perceptions of what it meant to be bilingual/biliterate. Their drawings and conversations led me to understand altruistic feelings from children who described the "gift of bilingualism" as affording the possibility to help family members and others. In New York City, we gathered drawings and conversations from 4 to 5-year-old kindergartners who demonstrated Alfie Kohn's (1992) idea of the "brighter side of human nature" when the major theme of the desire to help others emerged. Tracy, a 4 year old told us, "It feels nice (to help someone) … sometimes if feels a little cold in the inside and hot in the outside … that way you make them feel better … I found it all by myself" (Soto & Lasta).

In a more recent slice of this work in South Texas (Soto & Garza, 2011), we interviewed fifth graders in the hopes that their voices could help to inform teachers and policy makers about the needs of immigrant children. In their drawings and conversations, the children surprised us with their knowledge about immigration, the historical context, the family struggles including deportations, the dangers associated with immigrating from *Mejico*; they understood issues of power and questioned elements of historical freedom. They shared their hope, filled with possibility of sharing power. They understood the historical elements of colonization.

Miguel told us,

> I saw the movie, "A day without a Mexican"… Food starts lowering because there are no Mexicans to pick the food. No more houses being built and there is nothing to eat…. Immigration is not only messed up, but also screwed up…. Sure mess with the people that do most of the work … to make matters worse they cross the river, walk through a desert and risk their lives just to get here … in a free country. Miguel Z. (Soto & Garza, 2011)

The children inspired me to write a piece recently, entitled, "Latina/o Hope" (Soto, 2011) viewing the immigration experience from a variety of lenses. Perhaps our biggest challenge to date is to decolonize our minds. Poka Laenui (2000) teaches us about the process of decolonization with the goal of action-reaching consensus, "The process of colonization and decolonization deserves closer consideration in attempting to refashion societies. Otherwise, we may find that we are merely entrenching ourselves deeper in the systems, values, and controls put in place by the colonizer (p. 157)."

Conclusion

We are standing in the seventh moment according to Denzin and Lincoln (2000). They describe the possibility of imagining a new future as we note that we are not the only scholars calling for more responsive scholarship. In our case, how we view praxis and how we translate the idea of projects from the heart will depend on many variables including the complexity of the field, the culture of the field, and the willingness ("ganas") to undertake such projects. It may mean differing visions for different players as well as differing theoretical lenses and ideologies.

As we summon our imaginations to consider the complexities of schooling and education, we can begin to understand the dialectical process that includes our own understandings, our ethical understandings, and our abilities to forge deep human connections that will provide clarity for building new paths. The dialectic process can guide the possibilities for our creativity leading to transformative and liberating projects. By reflection, action, and reflection (Freire, 2000), the process becomes continuous and evolves organically based upon the needs of our community. In humility, we can ask for what is needed and, with a soft touch, act as consultants and fellow workers in solidarity.

Going forward, Pepa (2011) proposes a method for transformative research which includes five distinct steps: first, translation, the propositionalization of a phenomenon/event; second, hermeneutics/interpretation, the abstracting intellectualization of phenomenon/event; third, analysis, an investigation into the salient components; fourth, pragmatization, operationalization into the human experience; and fifth, evaluation, assessment of the transformative worth of the project. This multi-procedural cycle of progression, according to Pepa, can lead to transcendence and renewal.

The faces of educational leaders vary tremendously from principals to superintendents, to teachers, to scholars, and to policy makers with issues of power at the forefront. Considering the ideas of transformative projects (projects from the heart), however, initiated by educational leaders can have far-reaching effects. The interdisciplinary possibilities are endless. Keeping in mind the idea of ameliorative intentions can help us to reach a space that will change the face of contemporary education. The challenge to engage in transformative projects, projects from the heart, is yours. How might a liberating praxis benefit the daily lived realities of children and families? How can educational leaders implement social justice projects that will improve the lives of others, that will address issues of equity that will demonstrate our love for each other first within the fields of education and then outside with our communities.

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Part III
Leadership for Social Justice

Chapter 19
Leadership for Social Justice Education: A Critical Transformative Approach

Carolyn M. Shields

As we think about the topic of educational leadership and social justice, we must first acknowledge that each of these concepts is what some have called a "shifting signifier." The definitions and connotations vary widely and shift constantly. And yet, at a time of incessant calls for educational reform, for new structures, programs, and standards, the role of the educational leader often seems neglected in the discourse. In this handbook, our premise is that educational leadership is critically important. Moreover, we believe that there is no "one size fits all approach," and no "one best model" that will hold true in all times and all places. At the same time, there are some essential principles which we have learned can make or break a leader's work to transform schools to adequately (and excellently) serve all students.

Thus, with most of the scholars whose work is represented in this handbook, we are convinced that context matters. Educational leaders might operate differently in a homogeneous and relatively wealthy community than they do in a highly diverse, relatively impoverished community. The former might pay considerable attention to parents' booster groups; to attending community activities, extracurricular or sporting events; and generally to showing support for what is already occurring in the school and/or community. The latter, in addition, will need to attend to the provision of breakfast or lunch programs, to provide a safe and structured approach that offers stability to many students whose home lives are chaotic, and to ensure that teachers hold all students to high expectations while, at the same time, being sensitive to diverse cultural backgrounds and expectations. Thus, just as the role of the leader differs from place to place, so does the emphasis on social justice. In an affluent community, the leader may find herself challenging entrenched power and privilege and a sense of entitlement that is often present while the leader's task in a less

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affluent area might focus on the elimination of deficit thinking. Both are essential if we are to work to eliminate social injustice in the world.

As a starting point, in today's climate of high stakes testing and increased accountability in many countries, educational leaders must ask themselves if they are satisfied with the status quo. They must ask whether the schools in which they work are actually meeting the needs of all students, whether they are writing off certain groups of students who come from historically less dominant socioeconomic, religious, or ethnic groups or whether all students are actually achieving to similar high levels. Then, educational leaders must ask themselves whether they want to maintain the status quo, introduce educational reform, or actually *transform* their schools.

Theoretical Considerations

As one reflects on the answers to the above questions, one's thoughts of necessity turn to reflection on the nature of the leadership necessary, and one quickly becomes aware of the myriad of theories and approaches available—theories ranging from what were historically known as "great man theories" that attempted to determine whether certain personal characteristics could be associated with good leadership to more recent theories related to such things as servant, instructional, or distributive leadership. In between are a host of approaches ranging from the leadership wisdom of Sun Tsu, Machiavelli, and Napoleon to that of Lincoln, Colin Powell, Gandhi, and even Jesus Christ. Some theories emphasize personal qualities; others focus on process; while still others emphasize the desired goals. And, although there may be no one right way to think about leadership, there are some approaches, and guidelines for adopting a form of leadership appropriate to the task at hand.

It is fair to say that reflecting on one's organization is the first step towards determining the kind of leadership necessary to successfully attain one's goals. As a leader considers first what the organization is doing well and where change is necessary, he or she might first determine that stability and maintenance of the status quo is what is desirable. If this is the case, a transactional form of leadership may suffice—one in which the leader may offer small concessions (a particular class schedule, for example) in exchange for support of a specific policy or practice (perhaps a discipline policy related to gum chewing or hat wearing). Should the leader recognize the need for reform in the structure or operating procedures of the operation, then a reform-oriented approach such as transformational leadership (Leithwood, 2011) might be desirable. This popular form of leadership is aimed at the smooth and efficient operation of the organization in order for it to attain its goals—including high academic performance of students. In general, it identifies attending to various organizational processes such as developing a clear vision or ensuring support of all personnel. Thus, transformational leadership is most appropriate when a need for internal change has been identified and when the student population is relatively homogeneous.

On the other hand, if, when examining what needs to change, a leader determines that the very nature of the school and its relationship with the wider community requires transformation, then the form of leadership known as transformative leadership may be called for. Here the leader will recognize the need to become more inclusive of all children and their families and less exclusionary; he or she may determine that the power of the dominant cultural groups in the school has been used to marginalize and exclude some others rather than to welcome and support them and hence, traditional leadership activities will need to be expanded to address a wider and perhaps more complex array of issues.

Purpose

In this chapter, I argue that if leaders wish their schools to be excellent they will also need to be socially just. One cannot argue for the excellence of a school, regardless of test scores, if there are some groups of children who are misplaced in low-level special education classes; if certain groups of students are over represented in suspensions, dismissals, or dropouts; if parental wealth determines class or program placement; or if the curriculum is narrow and sterile and focused on test attainment rather than learning. These *injustices* in actuality prevent a school from being both socially just and academically excellent. The two go hand in hand. In fact, I would argue strongly that one cannot truly have one without the other. Thus, I also argue that educational leaders will need to focus on transformation rather than tinker with lesser reforms that do not fundamentally change the power relationships and hegemonic norms of many schools and educational systems. This premise, therefore, supports the inextricable link between leadership for social justice and what has emerged as a leadership theory known either as *transformative leadership* or as *critical transformative leadership for social justice*. (In general, I do not distinguish between them, for transformative leadership is inherently and incontrovertibly critical at its roots and foundation.)

Despite the different tasks and policies associated in various sites with educational leadership, here I explicate the concept of transformative leadership and demonstrate how its principles promote education that is socially just and inherently excellent in all contexts. It is not a prescriptive approach to leadership—but one that calls the leader to a deep examination of his or her beliefs, values, and principles and to ground his or her practice in responses to some deep, difficult, and often controversial questions. Transformative leadership is not a gimmick, it is not a new approach to leadership, and it is not simply a name applied to leadership after one or two small studies to promote the career of a specific scholar.

Transformative leadership has its origins in the work of James McGregor Burns (1978) and has been developed (as we shall see later in this chapter) by theorists working throughout the last 35 years including Foster (1986), Quantz, Rogers, and Dantley (1991), Shields (2009, 2011, 2013), Starratt (2011), Blackmore (2011), and many, many others. It is a theory with a starting point that is quite different from that of other theories in that it does not begin with either the leader or the organization but with an examination of the wider society and the material realities (including disparities and inequities) that impinge upon the ability of individuals to succeed within the organization and on the organization's ability to attain its goals. Hence, if the goal is to ensure that all students in a school reach their potential and succeed to high levels of academic attainment, understanding the socioeconomic and cultural realities of the students is the starting point. One cannot, for example, determine the appropriate programs, structures, curricula, and pedagogies for homeless children unless one understands their daily realities; similarly if a student body has a large number of former refugee children who have experienced trauma and lack of formal educational opportunities, the instructional starting point will be different from a school in a relatively homogeneous, middle-class, stable environment. Because transformative leadership's goal is to transform both the experiences and outcomes of schooling and the inequities in the wider society, it is the educational leadership theory that many have found to be most appropriate as a vehicle for advancing social justice goals—goals that the theory deems to be foundational to attaining high intellectual and academic goals as well (and, as stated previously, not oppositional to them).

This chapter will, therefore, provide a synthesis of the two concepts, social justice education and transformative leadership, and show clearly the inextricable interrelationships between them. It will situate the discussion in some of the North American controversies about social justice and also provide some global examples of what I understand by social justice education. Most importantly this chapter will elaborate how transformative leadership addresses the most complex and challenging circumstances faced by educational leaders.

Diametrically Opposed Concepts or Confusing Verbiage

In education, language quickly becomes co-opted, new theories become fads, fads become passé, and one is left wondering where to rest, even as on a temporary scaffolding. For example, Iris Marion Young (1997) suggested that community had come to mean little and suggested the metaphor of the urban city with its diverse range of passengers using public transit as a possibly productive way of thinking about the increased diversity in society. And yet, for most of us, the concept of community is not similar to that of city, and the suggested replacement has not taken root as passengers on a bus rarely interact and are not always even very tolerant of one another. The same is true, to a large extent, of the concepts of social justice and educational leadership. They rarely intersect and fail to underscore any commonalities as their proponents juggle for prominence. However, despite the myriad definitions, innumerable associated theories, and never-ending debates about their meanings and connotations, the terms themselves are robust. We understand that *social* implies intersections of various groups and communities. *Justice* and *injustice*, although playing out differently in different communities, tend to be easily recognized, if not easily addressed. Here, therefore, I discuss some of the conflicts and controversies but ultimately choose to continue to use the terms.

When I completed my doctorate in 1991 and entered academia, few leadership programs (then mostly called administration programs) introduced the term social justice at all—and even fewer, if any, used it as an organizing term. I recall first being introduced to Marx's concept of the iron cage and railing against the suggestion that all workers were oppressed. I remember the first academic conferences I attended, where I was told by more senior and better established professors that "ethics has nothing to do with educational administration" and that my interest in social context, social justice, and equity was not at all central to educational leadership but, indeed, "totally fringe." Yet, by 2009, the American Educational Research Association's (AERA's) Division A, "Administration" had become "administration, organization, and leadership," and "social justice" appeared everywhere on the programs of major research organizations such as the University Council for Educational Administration (UCEA).

By 2012, "social justice" had become one of five key program areas of AERA and an interest in social justice almost "de rigueur" for proposal acceptance, conferring a rite of passage for those in academic leadership preparation programs. As often happens, as everyone was adopting the term, each person tended to put his or her own ideological spin on it, depending on whether their background included a Rawlsian, Deweyian, and Marxist, other way of thinking about the purposes of education. In American education, accrediting organizations and those charged with overseeing the development and assessment of standards engaged in vicious battles over whether social justice should be included or whether its aims were too ideological for education—a field still (inaccurately) purporting to uphold objectivity and scientific approaches.

In 2006, for example, Wasley announced in a banner headline, "Accreditor of Education Schools Drops Controversial 'Social Justice' Standard for Teacher Candidates." The article informed its readers that the National Council for Accreditation of Teacher Education (NCATE) had won a key endorsement in its quest for continued federal approval of its accrediting power after announcing that it would drop language relating to "social justice" from its accrediting standards for teacher-preparation programs. Wasley (2006, para. 10) also reported that Stephen H. Balch, then president of the National Association of Scholars, responded that he was "delighted" by NCATE's decision to "strike the concept of social justice." Similarly, Greg Lukianoff, president of the Foundation for Individual Rights in Education, applauded the change as a "step in the right direction" (Wasley, para. 11). Others asked themselves how one could possibly be against the concept of a socially just education. What, they wondered, did people want?—a socially *injust* education?

An article in the Summer 2006 edition of *City Journal,* entitled "The Ed Schools' Latest—and Worst—Humbug", helped to clarify the conflict. Sol Stern (2006) argued that teaching for "social justice" was a cruel hoax on disadvantaged kids. His claim was that scholars and academics, because of their advocacy of social justice, attempted to address systemic inequalities and issues of equity by introducing activities that were “a frivolous waste of precious school hours, especially for poor children, who start out with a disadvantage.” He continued, “School is the only place where they are likely to obtain the academic knowledge that could make up for the educational deprivation they suffer in their homes” (para. 55). In other words, Stern equated social justice with frivolous “touchy feeling” activities and conversations that drew attention and time away from a high-quality education. For Sol Stern and many others, social justice and a high-quality education were diametrically opposed and centered on fluff rather than wrestling with difficult and controversial perspectives and practices that promote or maintain injustice.

For me, and others who clearly advocate for leadership for social justice, there is nothing oppositional about justice and quality. A socially just learning environment is the pre requisite for enabling all students to achieve to their full potential and attain a high-quality education. A focus on social justice is the way to assist students to make sense of the content they are learning and to take their places in a world that still calls out for equity and inclusion for all. A socially just education must counteract the injustices perpetrated on children who live in substandard housing, who go to bed hungry at night, or who live in war zones and fear for their lives or those of their family, by offering a better, more stable, and more peaceful future for all. Fortunately, however, in some countries, at least, where access to education is truly universal, schools can provide a haven from injustices, even though too often, children from disadvantaged families experience inappropriate placement in lower level classes, out dated textbooks, and indifferent teachers. These, however, are only a few of the inequities that exist in societies—advantaged and disadvantaged. Moreover, they suggest the need to address (in)justice where and whenever possible.

A social justice education, therefore, offers similar opportunities for intellectual development and high achievement to girls and boys, to students from rich or poor families to those from mainstream or marginalized social groups, to those from powerful and well-positioned families, and to those whose families, appear to have little political or social power, whose voices are rarely heard. Thus, it is clear that there is nothing arbitrary or optional about social justice.

A Critical Distinction

Thinking about leadership and social justice education has led me to several intersecting starting points: the first is the need to distinguish between what is sometimes called a “socially just education” and that which might be more accurately termed “social justice education.” The second is to invite reflection on what kind of leadership might be required to truly promote the kind of social justice education I believe necessary for the complex, rapidly changing, and uncertain world in which we live and to make the argument explicit that (critical) transformative leadership *is* a theory for social justice education. Here critical is enclosed in parentheses because it seems to me it is inherent in the very concept of transformative leadership, although some authors (Dantley, 2003; Quantz et al., 1991) have used the two terms together to emphasize the fundamentally critical nature of transformative leadership.

Burns (1978), in talking about what has subsequently become transformative leadership, wrote about revolution—again a fundamentally critical concept implicit in the theory itself; he wrote: "revolution is a complete and pervasive transformation of an entire social system" (p. 202) and later emphasized the need for "*real change*—that is, a transformation to the marked degree in the attitudes, norms, institutions, and behaviors that structure our daily lives" (p. 414). This paper will provide a synthesis of the two concepts, social justice education and transformative leadership, showing clearly the inextricable inter relationships between them.

Social Justice Education

When one raises the topic of social justice education in the United States, Canada, England, or other developed countries, one often hears talk of test scores, achievement gaps, high stakes testing, accountability, and ensuring that all sub groups of students have been able to achieve the basic standards (i.e., to pass the same tests). In other words, test-passing has not only been discussed as a socially just outcome, but it has (unfortunately) become the goal of educational leaders. This approach, although extremely limited, might be termed a *socially just education*—ensuring, at minimum, that all students have a similar opportunity for equitable access and equitable educational outcomes. If, however (as I have often done), one asks a school principal focused on test-passing what social justice would look like in a more homogeneous, more affluent school, one receives puzzled looks, an uncomfortable pause, and a stammered response to the effect that "those kids would have problems too." In other words, a socially just education, in many places, has somehow become equated in the minds of many educational leaders over the years, with overcoming problems in such a way as to permit all students to achieve the minimum standard determined by the test. In other countries a socially just education is simply associated with providing access to education to all children and youth, and even quality outcomes are still too often illusive.

A different way of thinking about social justice in education might be to provide a *social justice education*—in other words an education that begins with, promotes, and requires a more complete understanding of the social (in)justice issues in the school, the community, and the world in which students live now and in which they will work as thoughtful, contributing adults. Here, for example, instead of focusing on test scores or what is commonly called, in the United States, the "achievement gap" between White, African American, and Latino youth, it would be important to situate the educational experiences of each group in its socio cultural history, instead of simply addressing test scores.

In the former approach, well known by most educators around the world, achievement on whatever benchmark has been set by the legislative jurisdiction is seen as the primary purpose of schooling. In the second, the test is seen simply as one of many indications of progress towards broader and more inclusive goals that include both the private and the public purposes of education. Although educators emphasizing a socially just education may seem puzzled by questions about what social justice education would be like in an affluent, homogeneous school, educators taking the latter approach, social justice education, would emphasize the importance of addressing issues of power and privilege, of hegemony and cultural capital, of helping students understand the socio cultural historical realities of their communities and their country, and of promoting a consciousness of injustice and how to address it in the wider global community.

Thus, for example, in the United States, one could prompt dialogue about ways in which the history of slavery, reconstruction, and racism continue to affect how society and its institutions are structured today and of possible alternative explanations for the "achievement gap" related to the legacy of colonization and oppression. One might raise the issue of Mexican citizenship, colonization, "Manifest Destiny," and so forth and engage students in research and discussion of how the current situation of Latino students parallels this history of marginalization and oppression.

In Canada, student protests over a 3-month period in 2012 in Quebec about the costs of higher education the quality of education, and student debt might prompt similar discussion about the role of Franco-Canadians in the wider society. Similarly, the situation of the indigenous population of Attawapiskat and other communities brought to the attention of the general public in the winter of 2012 should be cause for sober reflection about Canada's true record of civil rights and the attendant lack of educational attainment of its First Nations populations. Residents of the Attawapiskat First Nation declared an emergency in October 2011, because 25 families were living in housing too flimsy to face the harsh winter. In November 2011, the Huffington Post posted a blog that emphasized that asked, "What if they declared an emergency and no one came?" and in which the claim was made that "What we are witnessing is the inevitable result of chronic under-funding, poor bureaucratic planning and a discriminatory black hole that has allowed First Nations people to be left behind as the rest of the country moves forward" (Angus, 2011).

Similar questions come to mind in other countries: how do we respond to emergencies affecting the wealth, and do we respond in similar ways to crises affecting the least advantaged sectors of the population? How does the general cultural approach to the rights and position of women affect the educational attainment of girls and women in countries like Somalia, Pakistan, or Iran? In what ways does the history of conquest continue to adversely affect those of indigenous ancestry in countries as diverse as New Zealand, Australia, Nicaragua, or Sweden? How does the UN declaration about sustainable development privilege those who focus on the development of natural resources for their own profit and how might it disadvantage those who live and work in South American rain forests or the Arctic? Why is it that garbage dumps, nuclear plants, and toxic waste disposal areas are never near the more affluent communities of the dominant cultural groups? Why do so many of the world's children still suffer from preventable diseases? Why, when so much of the earth's surface is water, do so many people not have clean, safe water to drink?

The questions are endless. The point is that a social justice education does not begin and end with the standard formal curriculum of a state but helps all students understand their place in the wider community and world—a place of power and privilege or one of marginalization and oppression. It helps all students, regardless of their current positioning, understand their own agency and their responsibility, not only to their immediate family or socio cultural group but to the wider community.

A social justice education therefore teaches students about the world in which they live, prepares them to become fully participating citizens in that world, and helps them to take proactive positions for justice, equity, dignity, and human rights. In order to accomplish this, of course, students must succeed within their own systems of education. They must learn to read, write, compute, think critically, and so forth. They will have to pass the prescribed tests and be able to proceed through whatever career path they choose, to a fulfilling career. The difference is in the clarity about goals, means, and ends. Passing a test, attaining a degree and being part of an institution that achieves what is called in the USA, "adequate yearly progress," are simply means to the desirable end of becoming a healthy, happy, and active citizen in a global society.

Leading for Social Justice Education

The task of leading any school begins with asking is like, "What is the purpose of the school?" and "What is the role of the leader in accomplishing that purpose?" If the response is that the goal is to support the status quo; to run an effective and efficient organization, as in transformational leadership (Leithwood, 2011); or to ensure the school meets adequate yearly progress while remaining within its budget, then leadership remains a technical task requiring little more than good managerial skills.

Nevertheless, in recent years, so many alternative approaches to leadership have arisen that it is difficult to keep track of them all. A simple categorization in terms of theories may be helpful. Some focus on the leaders' *traits* and *characteristics* (such as authenticity, authoritarian, charismatic, humorous), yet none of this research successfully identifies successful leadership with a specific set of traits. Another group emphasizes *processes* of leadership (hierarchical, collaborative, distributed, distributive, democratic, dialogue, and so on), with the general consensus being that leaders need multiple strategies and processes to accomplish complex tasks. Still others focus on the *purposes* or *goals* of leadership (instruction, learning, inclusion, equity, transformation). These, in part, must determine how the leader proceeds. Hence, my contention is that a leader must first identify his or her goals and then select the necessary processes, characteristics, and skills of the leadership team to be able to accomplish the desired purposes.

Given the significant diversity in any student body—diversity of race and ethnicity, culture and religious belief, ability and disability, sexual orientation, and socioeconomic status—a leader must also reflect on how differences among students in terms of their backgrounds, prior knowledge, and abilities might affect the attainment of the institutional goals. Sometimes educators and educational leaders determine that in order to be successful, they must fix, remediate, or even eliminate some of the students, interpreting their differences as deficits and introducing a variety of strategies and approaches to mitigate or overcome the deficiencies. Thus, in many schools, the predominant strategies include test preparation classes, extra help and tutoring, after-school and Saturday classes, elimination of physical activity, elective “frills,” or even recess. Here the leader is likely to accept the current structures and organizations of schooling, perhaps tinkering around the edges, introducing a new program or curriculum, identifying a slightly different schedule or even administrative structure, adding new opportunities for parental involvement, but not questioning or attempting to change the very fabric of the school itself. These activities may, in fact, increase test scores but do little, if anything, to advance equity or social justice education.

If a leader elects to take a different approach, identifying a mismatch between the knowledge and skills students bring into the classroom and that which is currently valued in the curriculum or the structures of schooling, he or she may decide that more radical change is necessary. Then transformation is called for and the question becomes transformation from what to what?

If the leader identifies the need to transform the school from a hierarchical institution where those with traditional power and privilege are advantaged and included and those with different forms of cultural capital, from less dominant cultural or economic backgrounds, are disadvantaged, even marginalized or excluded, then the response, however it is worded, implies the need to transform the educational institution from one of social injustice to one of social justice. And if the goal is also to transform the curriculum to one that teaches students about the world in which they live, how decisions are made, who has the power to influence the process, and so on, then the task requires a leader who adopts a transformative stance. Moreover, if one desires to effect transformation that creates a more level playing field, a more inclusive school culture, a curriculum that questions and critiques current approaches and interpretations, and preparation to take one’s place as a citizen and advocate for a more just global society, then leadership that promotes social justice, academic excellence, and deep transformation is called for.

Transformative Leadership: An Overview

The theory of transformative leadership responds to this latter need to create schools that are equitable and inclusive, as well as to provide learning experiences that teach students about, and prepare them for life in, the wider global community. It begins by taking seriously Foster’s (1986) comment that ends of educational leadership “must be critically educative; it can not only look at the conditions in which we live, but it must also decide how to change them” (p. 185). If one is an educational leader, it begins by recognizing the lived realities of those who make up the student body, acknowledging that their backgrounds affect their ability to be successful and the ability of the institution (school or even university) to provide a high-quality education. It requires accepting the diverse knowledge, experiences, and skills brought into the school by the students, not bemoaning their lack of middle-class cultural capital but starting where they are.

The tenets of transformative leadership are sometimes delineated using the following eight bullets:

- The mandate to effect deep and equitable change
- The need to deconstruct and reconstruct knowledge frameworks that perpetuate inequity and injustice
- A focus on emancipation, democracy, equity, and justice
- The need to address the inequitable distribution of power
- An emphasis on both private and public (individual and collective) good
- An emphasis on interdependence, interconnectedness, and global awareness
- The necessity of balancing critique with promise
- The call to exhibit moral courage (Shields, 2009, 2011, 2012).

Deep and Equitable Change

It is clear that a desire to understand and overcome social injustice and to promote social justice comprises a mandate to effect deep and equitable change. Adding a new program or involving more parents in the decision-making process may make the school more effective, but truly changing admissions standards, programs, practices, and attitudes may be necessary. Once there is recognition, for example, of a lack of inclusion in gifted programs, of overrepresentation of African America males in special education programs, or of barriers to the equal education of male and female students, the need for deep and more equitable change becomes obvious.

Deconstructing and Reconstructing Knowledge Frameworks

Here, the starting point is the necessity of deconstructing knowledge frameworks that perpetuate hierarchy and exclusion, such as attitudes that blame students, their parents, or their circumstances for lack of achievement. Accepting diversity as it is, without attempting to “fix” those who are not “like us” is the beginning of both a socially just and a social justice education. This will require the educational leader’s rejection of deficit thinking (Valencia, 1997, 2010), challenging of pathologizing practices (Shields, Bishop, & Mazawi, 2005), and reconstructing curricula and support structures that are inclusive and that build on the multiple forms of cultural capital that children from diverse backgrounds bring into the school environment.

Emancipation, Equity, and Justice

To achieve equity and social justice education requires drawing on approaches, attitudes, and assumptions that more closely resemble theories like Sen's (1992) or Nussbaum's (2006) capabilities approach. In fact, emancipation, equity, and justice begin with the kind of revolution that Burns (1978) emphasized—one that "transforms to a marked degree, the attitudes, norms, institutions, and behaviors that structure our daily lives" (p. 313). This may require dismantling programs that are not representative of all groups of students in a school or ensuring that the best and most experienced teachers, smallest classes, and the more resources are assigned to those children most in need of support, instead of (as is traditional in America) allocating them to the "top" groups of students.

Addressing Inequitable Uses of Power

This transformation includes recognition that democracy itself needs a revolution—one that, as Quantz et al. (1991) argued, will diminish "*undemocratic power relationships*" (p. 102, italics in original). Hence, the focus on emancipation also requires overturning the ways in which we often think about and (mis)use power. Indeed, as Quantz et al. suggest, transformative educational leaders must also learn to use their "power to transform present social relations" (p. 103). Weiner, too, emphasized the interconnections among power, justice, democracy, and leadership, saying "transformative leadership is an exercise of power and authority that begins with questions of justice, democracy, and the dialectic between individual accountability and social responsibility" (2003, p. 89). This may require, for example, a change in one's administrative team to ensure more representation of underrepresented groups. It may require taking a strong stand against an affluent group of parents in a school community who are used to having the leader's ear and working to ensure that the needs of those whose parents cannot as easily advocate for them are equally served.

Emphasizing Both Public and Private Good

Focusing only on what is good for individuals or subgroups, without regard for the greater good, emphasizes only the private good aspects of education—benefits that emphasize the better career opportunities, health benefits, or lifetime earning possibilities of those who complete higher levels of formal education. Without the foregoing concepts of deep and equitable change at the forefront of educational leadership and decision-making, it is all too easy to identify public good with the good of the majority, or at least, as often seems to be the case in political decision-making, with the good of those who currently hold the power. Examples of this misuse of power abound and one need only consider many of the recent legislative battles in the USA related to raising or eliminating taxes on the most wealthy to understand this concept. Education, however, can benefit the whole community when we are careful to educate all children—reducing the costs of prisons and incarceration, health care, and so on and increasing everyone's ability to participate in all aspects of civil society.

Interdependence, Interconnectedness, and Global Awareness

I earlier made the claim that a social justice education not only helps all students learn in an inclusive and equitable environment, holding them all to high expectations, but teaches them about the world in which they live. It requires educators and students alike to understand our interdependence and interconnectedness, as well as our responsibility to dismantle societal structures that perpetuate disadvantage for those in our neighborhood as well as people in faraway nations. Barrett (2012) recently conducted a study of how school leaders in affluent schools thought about public good and social justice, only to find that these leaders denied the extent of their privilege and wealth, always comparing their school to one down the road that had something they did not have. If this is the attitude of the educational leaders, how can we expect their students to understand how their wealth perpetuates power and privilege that many others will never experience? If, in North America, we focus solely on the common but misguided notion of "exceptionalism," how will our children understand that many countries also safeguard the very practices and freedoms we claim are only possible in America. How will our youth come to understand that stealth bombs in Yemen have killed so many villagers that instead of making our world safer by eliminating Al Qaeda in the Arabian Peninsula, they may be having the effect of uniting all Yemese against America? How can we help students understand that fighting to keep waste from being deposited in their neighborhood simply reallocates the dangerous elements to someone else's backyard and encourage them to work to eliminate, rather than relocate, dangerous goods and commercial by-products?

Balancing Critique with Promise

These questions lead, of necessity, to the tenet of advocating both critique and promise. To truly safeguard freedoms, educators must combine the promise of a prosperous and peaceful future for their citizens with critique of how actions in the rest of the world not only diminish similar opportunities elsewhere but attenuate the possibilities at home as well. Critique, for transformative educational leaders, may well begin with a critical examination of current practices of assessment and the excessive emphasis on standardized testing that marginalizes and stigmatizes so many children whose backgrounds differ from those of middle-class citizens. Leaders will want to ask whose backgrounds, cultures, and knowledges are being tested and whose excluded. Critique and promise will extend to elimination of transmissive pedagogical practices that exclude the voices and experiences of many children from immigrant, refugee, and low socioeconomic families, offering instead, the promise of dialogue, inclusive sense-making opportunities, and co-construction of more inclusive pedagogies. Critique will include fiscal policies that introduce fees that only some students can pay, reducing the opportunities of less affluent students to text books, higher education, or even to field trips or extracurricular activities and finding ways to value and include the contributions of every student and family and to provide them with equal opportunities. Promise may need to resist the efforts of policy makers to reduce financial aid to students in need, instead encouraging them to find ways to mitigate the incredible debt burden that too often accompanies the academic success of children from less affluent families. And in teaching students the art of deconstructing and critique political arguments, economic premises, and cultural assumptions, they will learn to understand not only why the world is full of inequities (unfulfilled promises Maxine Greene, 1998, would say) but how to begin to offer redress.

Exhibit Moral Courage

Each of these stances calls for the educational leader, who wants to be transformative, to exhibit moral courage. It is not easy to take a stand that is not particularly popular in the community in which one works, to critique a policy of those who have hired you, or to de-emphasize the very tests that can bring your institution additional funding and job security. In 2003, Weiner noted that transformative leaders always experience the challenge of having “one foot in the dominant structures of power and authority” even as they may be attempting to change them. Where this is not the case, he acknowledged, they would not likely have attained the formal recognition as leaders that casts them as “willing subjects of dominant ideological and historical conditions” (p. 91). At the same time, transformative educational leaders must be able to work from within dominant social formations to exercise effective oppositional power, to resist courageously, to be activists and voices for change and transformation. Again, this may look very different in different contexts. In Afghanistan, arguing for a broader curriculum that includes art or music might bring repercussions. In many countries, advocating for equal education for girls and boys or opening educational institutions to both sexes might be personally dangerous. In still others, being willing to protect the rights of children from same-sex relationships may raise the wrath of the local community. The details will differ, but the transformative leader will summon moral courage to ensure inclusion and equal opportunities for a safe and challenging educational environment for all students.

Conclusion

Taken together, the tenets suggested here as central components of the theory of transformative leadership provide guidance for the educational leader wanting to promote both socially just education and social justice education. They focus not simply on running an effective and efficient organization but on those elements of an organization that are truly educational and educative. This is important because too often we think about the similarities between leading *educational* organizations and others like nonprofits or businesses. The two are distinct in that in educational leadership, there is no product but the goal of educating all students to take an active role to ensure a better, more equitable, and more peaceful world for all. Educational leadership focuses on organizations and structures, politics and policies, finances, and human relations; but it also focuses, as we have seen, on pedagogy, curriculum, attitudes, beliefs, and perhaps most importantly on relationships—on knowing the material realities and disparities of those within one's organization and working to eliminate such inequities.

The need for a leader to have moral courage cannot be overestimated. One cannot enter into a leadership position without knowing clearly what guides and what grounds you, what you want to accomplish, and knowing what your "nonnegotiables" are. Only then can you decide at any given instance if a specific battle is worth fighting for, if it represents the hill one is willing to die on. Patience and persistence are valuable attributes, but only when they are grounded in a clear vision of the goal and in the need to take steps (even if small) to advance.

It is primarily *because* of the challenges inherent in educational leadership—and particularly in contexts that are themselves unstable and complex—that I believe transformative leadership provides guidance and some necessary touchstones for advancing an inclusive, equitable, and socially just agenda that leads to high expectations and achievement for all. The actions and activities I have described above are not unique. Nevertheless, attending to all eight tenets of transformative leadership ensures that one is not caught up in the day-to-day activities, meetings, discussions, and problems that confront every educational leader. Together, they can provide a constant reminder of the need for democracy and justice, for change to be inclusive and equitable and for existing norms to be constantly revisited and challenged when necessary. As educational leaders, we are cognizant that current practices are not adequate to ensure a high-quality and equitable education for all children, youth, and adults throughout the world. We are aware that to address this century's challenges, changing demographics, and changing socioeconomic and cultural conditions, educational institutions must also change. It is my firm belief that Oakes, Rogers, and Lipton (2006) are absolutely correct that traditional technical change is inadequate to meet the challenge. Hence, it is for that reason I posit the utility of a critical leadership theory—that of transformative leadership—as one way to remain focused on the goals of inclusion, efficacy, and excellence that all institutions seek. Having a conceptual framework that permits discussion and insights across cultural and national contexts about issues of immediate and growing importance is necessary to help the field and discipline of educational leadership and governance to keep pace with the significant demographic and social demands of our time.

Here, I have argued for a more careful and more robust articulation of both social justice education and of transformative leadership. I have tried to show that whether or not one includes the term "critical" in a discussion of social justice education or of transformative leadership, both are inherently and necessarily critical—in the sense of attending to the needs, backgrounds, and voices of those most neglected, most marginalized, and most oppressed in our society as it is currently constituted and in the systems of education that it perpetuates. (Critical) transformative educational leadership has proven to be a framework that can help a leader to make a significant difference amidst the challenges presented the twenty-first century.

Two decades ago, Quantz et al. (1991), writing about the kind of leadership that would bring about the kinds of social change called for by Burns, Foster, and so many others, argued that traditional theories of leadership were inadequate for democratic empowerment and that "only the concept of transformative leadership appears to provide an appropriate direction" (p. 96). Although the choice of a theory may be less important than the selected goals of the educational leader and the strategies adopted to attain them, I have, for some time, been perplexed at the continued separation in both scholarship and practice between the emphasis on social justice and the discussion of transformative leadership. At times, this separation has led to a somewhat frivolous use of both terms—sometimes implying that a leader who implements a structure for learning communities in his or her organization is fundamentally transformative, sometimes arguing that because a school has met the test benchmarks, it is socially just. The implementation of a learning community structure may well one strategy of the transformative leader but requires careful consideration of what kind of learning, for what purpose, and of how it will help to transform the institution from one of inequity to one of justice and equity. Attaining benchmarks may require considerable effort to support students whose home language is not English or who have little opportunity outside of school to study in a quiet and conducive environment; but it may also simply be a reflection of the overall levels of affluence and educational attainment predominant in the wider community.

We have not come very far since Burns called for revolution almost 35 years ago. Neither have we made much progress on Foster's (1986) appeal for education to be "critically educative." It is my hope that by carefully attending to both the processes of educational leadership and to the ends of our endeavor—both social justice and high-quality academic outcomes—as critically transformative educational leaders, we will be able to move forward on an agenda that truly includes, supports, and educates all students from all social, cultural, and economic groups. Our students, indeed our world, deserve nothing less.

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Chapter 20
The Spatial Nature of Justice: A Scholar–Practitioner Perspective

Patrick M. Jenlink

Introduction

> We must be insistently aware of how spaces can be made to hide consequences from us, how relationships of power and discipline are inscribed into the apparently innocent spatially of social life, how human geographies are filled with power and ideology. (Soja, 1989, p. 25)

Henri Lefebvre (1974/1991), in *Production of Space*, writes that social space is the "outcome of past actions, social space is what permits fresh actions to occur, while suggesting others, while prohibiting yet others" (p. 73). Therefore, space is an active and heterotopic condition that can be engaged by using analogous approaches as spaces "interpenetrate one another and/or superimpose themselves upon one another" (p. 86). Space may depict many states of being: emotional, linguistic, pedagogical, aesthetic, cognitive, cultural, economic, ideological, etc. In this sense, the educational setting remains an uneven tapestry of ever-changing spaces, juxtaposed, and overlapped, in which no space "ever vanishes utterly, leaving not trace" (p. 164). Social space is a product of past actions, a product of historical injustices as much as it is a product of current structural injustices placed in action by social discourse and practice.

Conceptualizing leadership concerned with social injustices as spatial practice rests, in part, with the conceptualization of power and identity or political subjectivity as defining elements of place and space. Massey (1995) carefully articulates matters of spatial practices as she argues that what is at issue "is the construction of *spatial* difference (and thus, for instance, the nature of differentiated places) through

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the articulation of *spatialised* social relations" (p. 284). Engaging in spatial practices that work to make space a practiced place—transforming the space of school as democratically practiced place—requires "that the purely constructed nature of social relations finds its complement in the purely pragmatic grounds of the claims to power legitimacy" (Mouffe, 2000, p. 100).

Conceptualizing leaders as scholar–practitioners as set forth in this chapter is concerned with examining a path to leadership as critical praxis for social justice. The argument is made that schools, as political spaces, are also practiced places wherein social injustices can be addressed. It is in understanding the spatial nature of schools that conceptualizing scholar–practitioner leadership is undertaken. The chapter is organized into four primary sections. The common theme that interfaces the sections is scholar–practitioner leadership and the spatial nature of social justice.

The first section addresses the politics of space and the practiced place of schools. The second section discusses the spatial practices necessary for scholar–practitioner leaders to take a stance on social justice and democracy. The next section examines the *matter of justice* as a basis for articulating scholar–practitioner leadership as critical praxis. The concluding section presents final reflections on scholar–practitioner leadership as spatial practice for justice.

Space and the Practiced Place of Schools

> Spaces are organized to keep a whole range of 'others' 'in their place' and can be seen as texts that convey to certain groups that they are 'out of place'…. (Morgan, 2000, p. 279)

The nature of the scholar–practitioner's work, the daily actions, takes place within time and space; there is both a temporality and spatial quality that draws into question how social space affects reasoning and practice. The scholar–practitioner is concerned with the implication of social space on historical reasoning, in particular questioning "…how cultural and political meanings are produced, sustained and interpreted?" (Epstein, 1999, p. 294). The politics of space and the practiced nature of place define the scholar–practitioner's work, in part. The school is a place that shapes and is shaped by space and social practices—spatial practices. Michel de Certeau (1984), in *The Practice of Everyday Life*, distinguishes between "place" and "space," when he writes, "*space is a practiced place*" (p. 117, italics in original). Thus, the school building mechanically defined by an architect is transformed into a space by teaching and learning activity. The school as a space is a practiced place, that is, a location demarcated by specific discursive or disciplining practices (de Certeau, 1984; Foucault, 1980, 1982). The school is a practiced place defined through the daily actions of those who populate its space, transforming it through the daily practices that define the work of educators and students.

Scholar–practitioners understand the importance of how spatial practices contribute to cultural and political affiliations and result in cultural meaning in relation to the political and ideological patterns that shape discursive patterns and influence social practice. The work of scholar–practitioners is necessarily concerned with how positioning, the placement of individuals within a social system, is concretized by cultural practices. Of particular importance are those cultural practices animated by ideology and politics, which present issues of injustice that work to marginalize or disadvantage or subordinate individuals within society. The scholar–practitioner seeks to question cultural codes and to explore social and political affiliations, poststructurally examining the disciplining discourses (Anderson & Grinberg, 1998; Foucault, 1980, 1982) and practices that transform "spaces into places and places into spaces" (de Certeau, 1999, p. 118). When space is transformed into place, it is defined by a concrete realization of political order.

Scholar–Practitioner Work as Spatial Practice

The work of the scholar–practitioner is spatial in nature, that is, it is bound in a temporality and a locality by a historical reasoning and political and cultural affiliations. As spatial practice, the scholar–practitioner's work is concerned, in a poststructural sense of place, with the historical origins of meaning. Such work is also concerned, in a poststructural sense, with the discursive disciplining of cultural practices. As Lefebvre (1974/1991) writes, the "spatial practice of a society secretes that society's space; it propounds and presupposes it, in a dialectical interaction; it produces it slowly and surely as it masters and appropriates it … the spatial practice of a society is revealed through the deciphering of its space" (p. 38). The scholar–practitioner's work, then, as spatial practice, is that of deciphering the space of school, the "practiced place" (de Certeau, 1999) in which teachers, students, and other cultural workers live their practiced lives.

Understanding the educational space of the school as a "practiced place" means discerning what makes such space a practiced place—i.e., instructional practice, learning practice, and leadership practice—and why a practiced place is political in nature. As (de Certeau 1991) notes, a place is "the order (of whatever kind) in accord with which elements are distributed in relationships of coexistence …. The law of the 'proper' rules in the place: the elements taking into consideration … each in its own 'proper' and distinct location" (p. 117). Therein, the conditions of discourse and practice are conditioned quite differently, depending on the "rules in the place" and therefore the nature of the relationships, i.e., whether there is a hierarchical nature or a symmetrical nature of the relationships. Power becomes a defining element of the practiced nature of place.

The scholar–practitioner, with respect to his or her work as spatial practice, must consider critically the pragmatic consequences of discourse and practice. This is important when we reflectively consider that a *place* may be understood as a configuration of positions. The practiced nature of *place* connotes a sense of fixedness that often works in conflicting ways for different individuals and groups. The scholar–practitioner's work as spatial practice is concerned with how space and place are defined through practice, made political, and why. The transformation of space into place, and relatedly place into space, is political in nature. Therein, the scholar–practitioner is concerned with spatial practices that work to advantage all individuals and groups, making "*space a practiced place*" that is more just and equitable for all.

Spatial Practices as Stance: Toward Social Justice and Democracy

> For too long the relationship between social justice and social injustice has been misunderstood. It is not a case of social injustice being the lack or violation of social justice…. Instead, the opposite is closer to the truth: social justice is the absence of social injustice. (Bufacchi, 2012, p. 1)

A fundamental concern for social justice and democracy is at the heart of scholar–practitioners' work in education. Inseparably linked with this concern is the question of whether schools are to serve and reproduce the existing society or to adopt a more critical role of challenging the dominant social order so as to develop and advance society's democratic imperatives (Giroux, 1992, 1994). The scholar–practitioner recognizes, as Neibuhr (1946) argued, that as a society our "capacity for justice makes democracy possible; but [our] inclination to injustice makes democracy necessary" (Neibuhr, p. xi). A more passive role lends to reproduction of the existing society, with its injustices, whereas a critical active role that challenges dominant social orders lends to transformation and the realization of a just, democratic society.

Within education, and more specifically within schools, all too often there are hierarchies of participation ingrained, ideologically dominated forms of social control that dictate to individuals how and whether they are to participate in what constitutes learning and other activities in the educational setting. The scholar–practitioner's work, in part, is to illuminate and interrogate injustices—such as those created by hierarchies of participation and forms of social control. The scholar–practitioner interrogates social structures and cultural practices that contribute to injustice, bringing democratic practices to bear so as to mediate cultural dominance, political ideologies, and asymmetries of power that work to reproduce cultures and social structures that foster injustices and inequities in educational settings.

Importantly, the scholar–practitioner understands that she/he occupies objective positions within a variety of contexts and that from these objective positions she/he must necessarily take a stance on differing social issues. Such distinction is informed by a realization of the interconnectedness of position and stance; acknowledging that a particular stance, critical or otherwise, is ineffective without accounting for one's position within different social contexts. Being in a position and taking a stance—position in contrast to position-taking—from that position is concerned with recognizing one's situatedness within the social issues (Bourdieu & Wacquant, 1992) and at the same time realizes that in order to affect justice, equity, or advance democracy, the scholar–practitioner must maintain her/his position within the educational setting in order to bring voice to social issues through one's stance on justice and democracy.

The scholar–practitioner understands that when social justice and democracy are central to the purpose of education, then schools enable the widest diffusion of teaching and learning as "a model of cultural renewal, in effect, to support something peculiarly consonant with the democratization of culture" (Scheffler, 1960, p. 57), democratization that mediates social inequities and injustices reflective of deeply entrenched social issues in society. The scholar–practitioner recognizes, as did Dewey (1916, 1927), the importance of making political and moral considerations an integral element of their practice, distinguishing between education as a function of society and society as a function of education. A scholar–practitioner stance is grounded in an understanding of theories of social justice and democracy, an awareness of the principles upon which justice and democracy are founded and the practices through which they are lived.

A Scholar–Practitioner Stance

Stance suggests an interrelatedness of both positional (position in situ) and orientation (position-taking) to convey physical positions of the person and the intellectual activities and perspectives carried over time and across different contexts. In this sense, stance makes visible and problematic the various perspectives through which scholar–practitioners frame their questions, illuminations, interrogations, and actions. A scholar–practitioner stance is, in part, a disposition through which the scholar–practitioner reflects upon his or her own actions and those presented by others. Rather than passively accepting information or embracing a false consciousness instructed by dominant ideologies, the scholar–practitioner takes a much more active role in leading, learning, and reflecting upon her/his relationship with her/his practice and the social context in which the practice is situated.

A scholar–practitioner stance on social justice and democracy is an ethical, moral, and political position-taking (Bourdieu & Wacquant, 1992) within a larger complexity of social, political, and cultural contexts. Such position-taking on the part of the scholar–practitioner is concerned with Dewey's (1916) argument that "the conception of education as a social process and function has no definite meaning until we define the kind of society we have in mind" (p. 97). If what we want is a democratic society, we must work to define that society, in part through our education systems and schools and through the social practices that animate the educational system and schools on a daily basis. A scholar–practitioner stance observes, as Maxine Greene (1986) explains, that the type of community, society, and world that

> …we cherish is not an endowment, … it must be achieved through dialectical engagements with the social and economic obstacles we find standing in our way…. We cannot neglect the fact of power. But we can undertake a resistance, a reaching out toward becoming persons among persons. (p. 440)

In this sense, scholar–practitioners must be *transformative intellectuals*, working within the cultural–historical contexts in which schools are situated, intellectual and cultural workers seen through the "ideological and political interests that structure the nature of discourses, classroom social relations, and values that they legitimate in their teaching" (Giroux, 1988, p. 127). This requires that the scholar–practitioner takes a critical stance, a further definition of stance through concerns for social justice, equity, diversity, caring, and democracy.

A critical stance for the scholar–practitioner is undergirded by a perception of reality that considers the world and our place within it as incomplete, becoming, and subject to our own projections. It is a critical encounter in which such issues as what counts as knowledge or practice become subject to individuals' own histories, ideals, practices, and perceptions (Freire, 1998, pp. 73–80). The critical stance does not simply acquiesce in or absorb new knowledge or practice but rather encounters it as a claim that exists alongside many alternative possibilities and therefore must struggle to retain its legitimacy (Curzon-Hobson, 2003). A scholar–practitioner who embraces a critical stance subjects his or her knowledge and practice to a variety of frameworks that he or she has encountered and reflects upon this practice or knowledge in social contexts characterized by tensions and conflicts.

The notion of scholar–practitioner stance is underpinned by a sense of fragility and openness in the social context; the positions one has in contrast to the position-taking one engages in give way to the fragility and openness. Importantly, the scholar–practitioner recognizes the value that is gained within a social context that is exploited by all in order to reflect upon and imagine anew what is presented and the perceptions of our interrelationships (Freire, 1985, p. 44). The scholar–practitioner often brings to question and introduces conflict to bear on the object of inquiry through his or her practice. Freire (1994) explains this process as "epistemological encircling" in which "new ideas—through dialogical inquiry—conflict with and challenge what is considered absolute and show the learner that things can be different" (p. 53). Thus, in mediating injustices and inequities within the educational setting, the scholar–practitioner works to create a more democratic culture while fostering a sense of becoming, both in herself or himself, as well as in others with whom she/he interacts. This creates a symmetry in the relationships and practices, participation and power, wherein the scholar–practitioner is working alongside others toward defining a socially just and democratic society. Defining a socially just society requires that the scholar–practitioner know what stance to take on social justice.

Social Justice

In *Rethinking Social Justice in Schools: How Will We Recognize it When We see it?*, Gale (2000) articulates a plural conception of social justice by identifying three categories: distributive, redistributive, and recognitive justice. It is important to fostering a scholar–practitioner stance that the distinctions be explored between the three categories; knowing how each works in relation to whether a stance on distributive, retributive, or recognitive justice is better aligned to fostering a more democratic educational setting. This is particularly important in relation to the scholar–practitioner's concern for social justice and democracy as central to transforming society and creating a more democratic society based on diversity through democratic processes populated by individuals that represent diversity of culture, ethnicity, race, language, economic means, sexual orientation, etc.

Distributive Justice

Distributive justice refers to the principles by which goods are distributed in society. Rawls (1971, p. 7) defined this form of justice as concerning the way in which the major social institutions distributed fundamental rights and duties and how they determined the distribution of advantages from social cooperation. Rawls argued that social justice involves two central principles: liberty, or individual freedom, and the equal distribution of material and social goods. The exception to the principle of freedom was the extent to which an individual's freedom was compatible with the freedoms of others. The exception to equal distribution was when unequal distribution would contribute to the well-being of those who have unfavorable starting positions.

This notion of social justice invokes what is often termed a "deficit model" of social justice, based on the idea that all individuals have the same basic needs. Relatedly, a liberal–democratic solution to an equality imbalance suggests the need to normalize disadvantaged individuals by providing them with basic material and social goods. From this perspective, the disadvantaged are those who are viewed as wanting in what society claims to be the educational, social, and cultural basics. In contrast, Walzer (1983) has argued social justice from a "complex equality" position, which takes the position that individuals do not have the same basic needs or the same resources at their disposal. Argued here is the need not for unequal distribution of social goods but rather a distribution of different social goods for different people. These two opposing views of distributive justice present competing guidelines for educational practice (Gale, 2000, pp. 254–255).

Retributive Justice

Retributive justice is primarily concerned with fairness in the competition for social goods (capitalist markets provide a referent example). In educational settings, academic merit is an example of "just desserts" or entitlements premised on academic performance. Here the translation may be made to students whose high performance equates to entry to privileged positions in schooling, employment, and access to positions of status within society. This view of social justice, as Apple (1988) notes, favors "property rights" over "person rights," thus creating a narrow sense of liberty.

In a market economy, the extent to which individuals have power in social relationships is a function of their property holdings rather than their membership in society (Gale, 2000, p. 257). Hierarchical participation as a form of social control within schools evidences how students are positioned in relation to their cultural and social capital. Limited property rights therefore results in limited power to participate; it works to silence voice and marginalize individuals and groups. When individuals attempt to cross boundaries established by forms of social control, this may be interpreted as "illegitimately infringing on the rights and freedoms of others" (Carr & Hartnett, 1996, p. 28). When a negative influence on social justice exists, such as punishing those who infringe on the rights and freedoms of others, this translates as retribution. Retributive justice is useful in naming the implicit perspectives legitimization of the retribution meters out to individuals. Narrow liberties of some foster inequities and injustices, ensuring that hierarchies of participation remain and that equity in participation is distorted (Gale, p. 257).

Recognitive Justice

Recognitive justice is concerned with rethinking social arrangements thought to be just, valuing a positive regard of group differences and acknowledging democratic processes based on group representation. It is a social justice premised on recognizing diversity and how social justice contributes to a recognition of difference, enabling the formation of individual and collective identities through democratic processes, processes that recognize the individual as having value. Relatedly, Berlin (1969) is instructive in understanding recognitive justice, advocating three necessary conditions: (1) fostering respect for different social groups through self-identification, (2) opportunities for groups' self-formation, and (3) the participation of groups in decision making that affects their lives directly.

Recognitive justice is concerned with cultural domination, being subjected to patterns of interpretation and communication associated with another culture which conflicts with one's own culture. Recognitive justice is also concerned with nonrecognition, being rendered invisible by means of authoritative and normative practices that distance and silence. Equally important, recognitive justice is concerned with how individual and group identity may be controlled and/or shaped through asymmetries of power and ideological dominance, scripting the identity of individuals and groups in such way as to socially position into them into social categories that marginalize or otherwise disadvantage.

The Distinctions

Distributive and retributive justice both appear to be more concerned with individuals' material wealth; both demonstrate a confinement of perspective to economic rather than cultural politics of social institutions, such as schools (Gale, 2000). Recognitive justice, in contrast, is concerned with cultural politics and the participation of individuals and groups in decisions and activities that affect their lives and/or impact on their social well-being. Herein social justice becomes problematic for the scholar–practitioner, as she/he struggles with identifying with a perspective and its role in the construction of one's stance. Importantly, if the image of the society we seek is that of a just democracy, then the stance on social justice must necessarily align with more democratic practices, benefiting all individuals.

Importantly, the scholar–practitioner understands that in contemporary society, identity formation of individuals and groups is connected to Dewey's (1927) notions of the public, and his acknowledgement of how the small publics (schools, parent organizations, etc.) contribute to the development of a larger democratic public. Importantly, the scholar–practitioner stance recognizes a "definite ideal of the place and function of the school in the ongoing process of society, local and national" and requires a "definite point of view, firmly and courageously adhered to in practice" (Dewey, 1985, p. 68). A scholar–practitioner stance on social justice grounded in a recognitive justice perspective advances the principles of democracy while engendering a concern for the identity of individuals and groups.

Democracy

In *Democracy and Education*, Dewey (1916) identified the "widening of the area of shared concerns, and the liberation of greater diversity of personal capacities" (p. 87) as hallmarks of democracy. He noted that only after "greater individualization on one hand, and a broader community of interest on the other have come into existence" (p. 87), only could these characteristics be sustained by voluntary disposition and interest, which must be made possible by means of education. Dewey further stated that a democratic society "makes provision for participation for the good of all its members on equal terms and which secures flexible readjustment of its institutions through the interaction of the different forms of associated life" (p. 105).

The scholar–practitioner understands that democracy is not an all-or-nothing affair but a definition of degree; societies and institutions can vary in both the extent and the intensity of their commitment to democratic practice. Therefore, there are many degrees and definitions of democracy, each marked by an idiosyncratic nature within particular cultural–political contexts. The scholar–practitioner recognizes that the "foundation of democracy is faith in the capacities of human nature; a faith in human intelligence" (Dewey, 1937, p. 458). Democracy is belief in freedom, "the basic freedom of mind and of whatever degree of freedom of action and experience is necessary to produce freedom of intelligence" (p. 459).

A scholar–practitioner stance on democracy reflects an ethical, moral, and political position-taking that ensures freedom of "expression, general diffusion of knowledge, the marketplace of ideas, and open pursuit of truth so that citizens continuously educate themselves to participate, learn, and govern beyond the limited ideas of individuals" (Glickman, 2003, p. 274). Importantly, the scholar–practitioner works to mediate the "politics of reality" for many individuals (Scheurich, 2003), politics that marginalize and distance her/him from authentic participation and at the same time silences her/his voices from being heard in decisions that affect her/his lives.

The scholar–practitioner's work, then, in part, is to foster a sense of freedom of mind and freedom of actions. In part, the scholar–practitioner's work is also to invoke in others in the educational setting to retain a sense of incompleteness and becoming; democracy is never achieved, rather it is in a continuous process of becoming. Maintaining a sense of incompleteness and becoming, a just and democratic society is the result of the individual's will—teacher and student—and the scholar–practitioner's encouragement to critically question, challenge, and overcome in full recognition of the imaginative possibilities of a world beyond the human will to objectify individual lives (Curzon-Hobson, 2003).

The *Matter of Justice* as Critical Praxis

> … human beings, as subjects, are not objectively determined in their existential condition by universal laws of nature, but they are phenomenal 'happenings' as a consequence of a plurality of socio-historical effective forces, mindful purposes, and cultural traditions. (Lum 1993, p. 39)

The existential philosopher Jean-Paul Sartre (1949) wrote: "… if I am given this world with its injustices, it is not so I might contemplate them coldly, but that I might animate them with my indignation, that I might disclose them and create them with their nature as injustices, that is, as abuses to be suppressed" (p. 62). These few words acknowledge the difficult, perduring challenges for those who would transform a world into one defined more so by its advancements of social justice. These same words speak to the moral responsibility of the scholar–practitioner leader in today's educational setting.

For the scholar–practitioner, in Sartre's world of injustices, the obvious, yet profound, implication of leading defined by social justice is that justice is neither a simple nor an ever-finished responsibility. Justice is at once a process, linked to a goal democratic society met by moral responsibility, and at the same time justice is a way of life that defines one's individual humanity and at the same time directs one's contribution to society. And with respect to the nature of the relationship a scholar–practitioner must have with the public, social justice defines, in part, the scholar–practitioner's identity as moral agent of a society seeking to be increasingly more just and democratic. As educators experience all too often upon entering their first and subsequent assignments, injustices and oppressive practices define classrooms and schools, amplifying the level of disadvantage for the less privileged and marginalized populations.

When injustices pervade an individual's life, they also pervade the lives of those closest to him or her. The scholar–practitioner understands that experiencing injustice of any kind leaves an imprint on the individual, and in turn that imprint shapes social interactions with others. This is particularly important for scholar–practitioner leaders and the individuals they interact with in the educational setting. Who one is as a person, as an educator and the notions he or she has about social justice animates the nature of the individual's relationship with students, teachers, parents, and the larger public. The scholar–practitioner understands that when an individual allows injustice to pervade his or her life (inside or outside of the educational setting) or to manifest around him or her in the lives of others (students, parents, colleagues), the individual allows a part of one's self and a part of society as a whole to be diminished, devalued. The devaluing has an incalculable social and moral impact on all persons in society. Either directly or indirectly, by an individual's experiencing injustice, the factor of experiential consequence grows, exponentially, and speaks to a devaluing of the one, the many, or the whole of society. Experiencing injustices – indifference, inequity, oppression, false consciousness, ideological domination, etc. – diminishes the whole of society, one person or one group at a time.

As moral agent, the scholar–practitioner understands that injustices reflect social disrespect—or absence of political and moral positionings upon which a just and fair society is premised. Such disrespect is not confined by particular social boundaries. Rather, it pervades all aspects of political and social life. To counter injustices in society, scholar–practitioners must take an activist role in educational settings, fighting against injustices of any kind and at the same time fighting for social respect and just treatment. It may well be that we have to reconceive the preparation of educational leaders to the end of freeing them first from the valances of an unjust society, free them so they may resist marginality (Greene, 1973) and rebuild a social order in schools that rests on visible, tangible grounds. As Sartre (1947) explains of freedom, "in wanting freedom we discover that it depends entirely on the freedom of others, and that the freedom of others depends on ours…" (p. 53).

The *Matter of Justice* in Scholar–Practitioner Leadership[1]

> If inequities undermine social cohesion, whether they stem from historical injustices or contemporary events, these injustices ought to be addressed if we are to establish a just society. (Streich, 2002, p. 540)

The *matter of justice* is connected, deeply, to the very nature of who one is as a human being and as a scholar–practitioner. There is an obligation, on the part of the scholar–practitioner, to reflect, critically, on the meanings he or she, himself or herself, has internalized in the course of growing up and becoming educated (Greene, 1973). This is particularly important in that the scholar–practitioner, as an individual, is being and/or will be asked to create learning experiences in which students and teachers will be able to articulate what they take for granted and/or consider natural common sense.[2] The importance this holds for educating students and how this translates for the teacher and student might be stated so: "What is taken for granted as a given and never questioned may become a mode of oppression for some, a mode of dehumanization for others" (Greene, p. 184). In the process of becoming an activist for social justice, the scholar–practitioner's responsibility is, in part, to work with students and teachers in a conjoined effort to probe and to clarify and to examine the inner workings, so to speak, of what defines the individual in terms of his or her beliefs and understandings about justice versus injustice.

Spiraling deeper into the *matter of justice*, scholar–practitioners need to necessarily understand that the *what*, *how*, and *why* of leading cannot be separated from the basic conditions under which teachers and students engage in the educational experience on a daily basis, conditions of external and internal political forces at play, conditions of economic stress and poverty, and conditions of ideological domination. Given these conditions, learning, as Greene (1973) explains, "involves a willingness to pose disturbing questions, to take risks, to look through new perspectives upon the familiar life-world" (p. 184). This means rethinking how social practices in educational settings function as a form of pedagogical work defined by social justice within "ubiquitous relations of power and how schooling can be addressed as a crucial site for struggle" (Giroux, 2003, p. 11).

Consequently, the fundamental challenge facing scholar–practitioners within the current age of neoliberalism is to provide the conditions for teachers and students to address how knowledge is related to power of both self-definition and social agency. The *matter of justice* is a political matter, a matter of class, culture, race, and difference against a backdrop of neoliberal attacks on education and the de-democratizing of schools. Here Giroux (2003) is worth quoting:

> Central to such a challenge is providing students with the skills, knowledge, and authority they need to inquire into and act upon what it means to live in a radical multicultural democracy, to recognize antidemocratic forms of power, and to fight deeply rooted injustices in a society and world founded on systemic economic, racial, and gender inequalities. (pp. 11–12)

This requires, with no small amount of work, that scholar–practitioners address the practical consequences of their work in the broader society, simultaneously providing for all within the educational setting authentic and critically oriented learning experiences that enable the learner (student and teacher alike) to make "connections to those too often ignored institutional forms, social practices, and cultural spheres that powerfully influence young people outside of schools, especially within the ongoing and constantly changing landscape of popular culture" (Giroux, 2003, p. 12). It is within the changing landscape of education that injustices hide and manifest in the lives of teachers and students and by extension the society at large. That means it is within this same changing landscape that scholar–practitioners must necessarily consider the *matter of justice* in leading and consequently situate the work of leading the educational enterprise toward a realization of social justice in the reality of an all too often unjust society.

The *Matter of Justice* in Leader Practice as Spatial Justice

> Time does not heal the wounds of injustice when it leaves in place the institutions and practices that embody that injustice. (Williams, 1998, p. 197)

Space encodes power; it restricts and "decides" what activities can take place. As Henri Lefebvre (1974/1991) writes, "Space lays down the law because it implies a certain order – and hence a certain disorder…. Space commands bodies" (p. 142). As for the "readability" of space, Lefebvre reminds us that the interpretation of space “comes last in the genesis of space itself … space was produced before it was read,” produced in order “to be *lived* by people with bodies” (pp. 142–143, emphasis in original). Space by its nature as social may be foster justice or injustice in and between the actions of individuals, groups, and a culture or society. The nature of injustice resides in the nature of individuals’ actions. This is true for the scholar–practitioner just as it is for those with whom he or she works.

Where scholar–practitioners leaders are concerned, the question of injustice in society is one directed internally, that is, it is a question for the individual and for his or her practice and concerns what is justice in the context of social injustice. The responsible answer is a decision to undertake leadership practices that characterize leaders as critical, principled, ethical human beings—that is, moral agents, as scholar–practitioners who rage against inequity and indifference. Foster (1989) is instructive when he states: “Leadership must be ethical. It carries a responsibility not just to be personally moral, but to be a cause of ‘civic moral education’ which leads to both self-knowledge and community awareness” (p. 284). Leader practitioners must see the import of being moral leaders who embrace social justice, who take the battle against injustice into schools and classrooms across the country, and who see the promise of a just and democratic society for all.

The *matter of justice* in leader practice is best defined as a deeply seated moral responsibility, a responsibility that concerns the practiced place of schools and the spatial nature of practices that give way to justice or injustice. Leaders, as moral agents for social justice, must understand leading for social justice is a process and a way of life. This way of life, it is argued, must respond to injustices in society by leader exerting new efforts to continuously work to recreate themselves as responsible moral agents in educational settings, in schools, classrooms, and all the related social spaces of education. Leaders, as agents against social injustice have a responsibility to examine, critically, and articulate the reasons for what they are doing as they work within educational communities. Thus, by creating themselves as moral agents of justice, leaders in turn translate this social agency for justice into the curricular and pedagogical underpinnings of that define the social space of schools into practiced places of justice and democracy. Leaders, too, must take a stand against the political and the normative, against the illusion of a world represented as acceptable, reaffirming, as that world may seem. Freire (1994) offers insight in this respect with his call for *conscientizacao* (critical consciousness); leaders must learn “to perceive social, political, and economic contradictions, and to take action against the oppressive elements of reality” (p. 17). Leaders must use this *conscientizacao* to examine their world; they must be provoked to look at what is familiar and comfortable in leader practice, through new and critically aligned perspectives and examine anew the preconceptions, accommodations, and injustices hidden beneath the veil of mystification and common sense.

Drawn into specific relief, leaders, in interrogating and illuminating injustices and advocating for social justice, must provoke the educators and cultural workers within schools and educational setting into a “heightened sense of agency” by being connected to their life-worlds and by being encouraged to “recover their own landscapes” (Greene, 1995, p. 48). At the same time the leaders and cultural workers must be provoked into a heightened sense of reality concerning injustices in society. This raises the question, who or what provides that provocation? Without providing a template, Greene explains, "we have to be there in the first person … eager to tell our stories and listen to others, eager to attend to the changing culture's story in which so many narratives intermesh" (p. 37). The provocation comes from within the individual, but as an individual aware of others and of the impact of self on others. This necessarily requires leaders to reconceive leader practice so that it is aligned with the *matter of justice* as critical praxis. And this means that provocation originates within and through leaders who are wide awake to the reality of injustices that plague society. Herein the importance of Freire's (1994) *conscientizacao* comes into play as a factor in both preparation and provocation.

Final Reflections

Leadership in any endeavor is a moral responsibility. This is as true for Sartre's (1949) world of injustices as it is for the educational settings of today. The scholar–practitioner understands this point, and he or she understands the moral imperative of leading and learning to lead defined by a concern for social justice. That said there must be a willingness, on the part of both the leader educator and the student of leadership, to critically question the actions of himself or herself and others, to take risks in his or her respective educational settings. And it requires a willingness to look through new, as yet unexperienced, perspectives upon the familiar, yet all too often taken-for-granted world, a world, as Sartre wrote, defined by injustices not to be contemplated coldly. Necessarily, it should also involve, as a priority of practice, an examination, critically, of cultural assumptions, as well as a conscious effort to make coherent sense of experiences, past and present. These efforts must be identified as hallmarks of the scholar–practitioner leader's praxis.

The *matter of justice*, as emphasis leader practice, is best understood, in large part, as a form of critical praxis defined by a moral imperative for social justice, and therein it is performative. As praxis, leading "for the sake of arousing the kinds of vivid, reflective, experiential responses that might move [individuals—students, teachers, the larger public] to come together in serious efforts to understand what social justice actually means and what it might demand" (Greene, 1998, p. xxx). Leadership, as critical praxis in the educational setting, in this sense, becomes performative and highlights considerations of power, politics, and ethics fundamental to any form of socially just and morally responsible practice.

In the end, the *matter of justice* as critical praxis in leading will be dependent, largely, on the degree to which the *matter of justice* directs the design and conduct of leader preparation, the nature of curriculum, pedagogical practice, and authentic experiences in learning. Perhaps the most difficult challenge confronting leader educators and practitioners, and society at large, is that we must confront injustices that reside within ourselves and within our social institutions. We must look into the abyss and embrace what it is that looks back at us. That means, simply put, that the *matter of justice* in leader practice must be performative and at the same time a way of life. This cannot be optional if the goal of a just and democratic society is to be realized. This is the *matter of social justice* in scholar–practitioner leadership.

The *space* of school, and relatedly the *place* of colleges of education, as socially produced, is shaped by spatial discourses and practices. The *spatial* nature of the educational setting draws into specific relief the importance of scholar practitioner–leadership, as critical praxis, being concerned with the spatial nature of injustice, and the historical as well as contemporary structural injustices that pervade educational institutions. The scholar–practitioner understands that when external entities attempt to shape the spatial practices, they introduce practices encoded with political and ideological agendas and beliefs, accompanied with narratives that work to make such practices appear common sense, or "real life." Shaping practice in fixed or rigidly narrow fashion limits space and limits the imaginative and creative potential of practitioners and students. Such shaping of space through external political agendas is a form of mystification. Mystifications "disguise or transpose … real life" (Lefebvre, 1974/1991, p. 146) by providing explanations which achieve the status of common sense and yet mask injustices. The scholar–practitioner works to disclose such mystifications, to make visible the relationship between appearance and reality, distinguishing between politicizing education and making education political.

The *place* of school and relatedly the *place* of colleges of education, historically as well as in the current stream of discourse, are characterized by a "sense of place" that generates conflict and is made conflicting by external forces that work to redefine educational practice through differing discourses of power and disciplining practices (Foucault, 1980). Importantly, the scholar–practitioner is concerned with identifying the political agendas that animate political issues and which make problematic the work of individuals, such as students or teachers, who work within a particular place, such as the school or college classroom. Mediating the politics of place is central to the work of making the *place* of school more equitable, just, caring, and democratic.

A challenging reality for all who are responsible for leading the educational enterprise as well as for those who are responsible for preparing morally responsible leaders is that the work of social justice will come neither easy nor without a cost. All concerned must be committed to rage against injustices on any and all levels; they must confront injustices in politics, policies, program curriculum, and pedagogical practices.

Notes

1. Here I draw from Maxine Greene's (1973) conception of justice as it relates to teaching, set forth in her work, "The Matter of Justice." For additional insight, see her article in Teachers College Record.
2. Common sense as used herein from this point forward reflects a more formal, distancing concept, used adjectivally not substantively, to indicate the naturalization

> or taken-for-grantedness of popular beliefs. Actually, the great need, at this moment of transition, and indeed today, is for a politics that can root itself in the lived contexts of differently subordinated social groups, starting—but not ending—with commonsense understandings. Common sense or "the profane everyday" (Johnson, 2007, p. 101) reflects the work of hegemonic forces—the actions of dominant ideologies—and exists in the dynamics of culture and power, understood in a Gramscian (1971) way. Common sense is understood as both "a ground or starting point of political practice, and, renovated, is its product" (p. 101).

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Chapter 21
Promoting Inclusive Leadership in Diverse Schools

James Ryan

Years ago when I was a junior faculty member and just beginning my leadership and diversity research program, I received a review of my work that was hard to forget (see Ryan & Rottmann, 2007). I had submitted a proposal to present a conference paper, and one of the reviewers questioned the value of leadership and diversity topic that I had intended to explore. This reviewer felt that there was no point in writing a paper in an area that had already been thoroughly covered. She/he noted that a colleague had already addressed the leadership and diversity issue, and that there was no point in traversing the same ground. Apparently, the colleague had said everything that needed to be said about the area. At the time I had a pretty good sense of the literature in the area—or rather lack of it—but did not recognize the leadership and diversity expert that the reviewer cited. And try as I might, I could not find any subsequent reference to this particular individual. Although puzzling at the time, the reference to the nonexistent expert did not influence the acceptance of the proposal. As it turned out, the paper was accepted, probably due more to the fact that I knew the program chair than to the lukewarm sentiments of the reviewers.

This kind of reaction was not unique. I have received a number of these kinds of responses over the years. I suspect that many others who have worked in diversity-related areas have also encountered similar reactions. My point here is that only a few years ago leadership and diversity was not acknowledged as a legitimate area of inquiry and practice in the field of educational administration, despite the fact that schools around the world were becoming increasingly diverse. Even with these obvious changes, champions of the traditional canon in education administration saw fit not to acknowledge this diversity and, if they did, believed that they did not warrant different approaches to administration and leadership. Instead, they continued to insist that long-standing generic models of administration were more than

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capable of providing an appropriate basis for the administration of schools. Diversity was but a minor distraction, the complications of which could be solved by a decisive research study or two in the area.

Thankfully, circumstances have changed in the intervening years. Issues of diversity and leadership are now considered a legitimate area of study, at least in some communities of inquiry. This handbook is just one example of this change. This shift reflects the tendency of scholars and practitioners in educational administration to take diversity issues more seriously. They are doing so because they recognize the significance of these differences for student experience. More pointedly, they acknowledge that the ways in which these differences are configured—interpreted, valued, and judged—can have a decisively positive or negative impact on how students learn in school. For example, differences associated with culture, ethnicity, race, social class, sexual orientation, gender, and ability can mean the difference between success and failure, enrichment and impoverishment, and hope and despair for students. In most contemporary schools in the Western world, nonwhite, female, gay, lesbian, poor, and differently abled students frequently do not have as positive an educational experience as their white, male, straight, middle-class, and physically able counterparts. Many of the former tend to achieve at lower levels, drop out in greater numbers, and are less likely to attend postsecondary institutions than the latter (see, for example, Bennett, 2001; Darling-Hammond, 1995; Natriello, McDill, & Pallas, 1990; Orfield, 1995; Paquette, 1990). Of course, not all students in the aforementioned groups follow this path. But even those who perform well academically suffer from other significant consequences of this differential evaluation. Like their comrades, they are systemically subjected to harassment, exclusion, and discrimination both in school and later, when they leave to go out into the working world (see, for example, Datnow, 1998; Lugg, 2003; McFarland, 2001; Orenstein, 2002; Ryan, 2006a; Stein, 2002). Difference makes a difference for students and their parents.

The unfortunate way that these differences play out has shaped how many scholars pursue leadership and diversity. Most are not content to be idle or neutral bystanders or merely describe what they study in a clinical or detached manner. They care deeply about what is happening to already-marginalized groups in schools and are determined to do something about it. These sentiments figure prominently in their approaches to inquiry. Many believe that their work in areas like leadership can provide the foundation for action that can rectify these unfair practices. Only comparatively recently, though, have individuals within the field of educational administration come to use the term "social justice" to describe what they do, despite the fact that the term social justice has been around for some time. In the past, those in the field of educational administration concerned with the plight of the marginalized—few as they were—tended to associate with other monikers, like "critical theorist," "feminist," "neo-Marxist," or "poststructuralist." Many continue to identify with these traditions, but many also now employ the term, social justice, to position themselves in the field of inquiry. In doing so, they distinguish themselves by their uniquely critical approach to social justice, which differs in important respects from classic liberal perspectives, like that of the often cited Rawls (1972).

It is difficult to say why these critically minded scholars now also identify with the social justice perspective. One possible reason may be associated with the problem of focusing on only one axis of disadvantage, like sexism. It is becoming increasingly difficult to understand and do something about sexism without acknowledging the many different ways that it interacts with other oppressive structures like racism, classism, and homophobia. It could well be that scholars find the social justice umbrella appealing because it points to a wider scope of study and practice—one that moves beyond a unique focus on just sexism or racism, for example. Another possible reason for this move to social justice is that critical scholars are recognizing and appreciating the similarities they share with their colleagues in the wake of increasing and alarming threats to already-marginalized populations in their schools and communities. The social justice platform may be acting as a rallying point for critical scholars, educators, and community members wishing to challenge the recent waves of inequitable policies by providing a discourse that enables them to collectively understand and contest wide-ranging oppressive practices associated with the current social context.

As the social justice movement has evolved, its disciples have conceptualized social justice in a number of ways. One of these is inclusion. A number of advocates look to the idea and practice of inclusion as one way to promote social justice. This preoccupation with inclusion has also found its way into the theory and practice of leadership. This chapter explores the idea and practice of leadership and inclusion. In particular it examines how administrators of diverse schools endeavor to make their schools inclusive places. It begins with an account of the relationship between social justice and inclusion, followed by a description of leadership and inclusion. Next, I explore the ways in which administrators of diverse schools have attempted to make their schools more inclusive. Toward this end, I describe some of the challenges associated with the promotion of inclusion. This is followed by a depiction of how administrators employ communication practices, use critical learning strategies, foster school-community relationships, and exercise strategic advocacy.

Social Justice and Inclusion

Social justice is not an easy concept to pin down. Most commentators on social justice, though, concede that it is about legitimacy, fairness, and welfare. In this vein, promoters of social justice emphasize the idea of distribution (Rawls, 1972) and recognition (Fraser & Honneth, 2003). Distribution and recognition are, in turn, closely associated with inclusion. When people are included, they tend to be part of just distribution practices and recognized or valued in positive ways.

Rawls (1972) was one the first scholars to comprehensively address the issue of social justice. For him, social justice was associated with distribution. He maintained that that social justice can only be achieved with the equal distribution of goods, rights, and responsibilities. Issues with Rawls' liberal individualistic view aside, social justice involves more than resource distribution and economics. It is also about recognition (Fraser & Honneth, 2003). Recognition is important because injustice arises in situations where certain groups are not accorded the same value—the recognition—that others receive. Achieving social justice requires that those marginalized by virtue of their particular identities—frequently related to gender, race, ethnicity, ability, and sexual orientation—receive the same recognition as others. Promoting social justice, then, requires attention to both distribution and recognition. Among other things, seeing social justice in terms of recognition as well as distribution allows advocates to view the pursuit of social justice as a process rather than strictly an outcome.

Distribution and recognition figure into the ways in which scholars have approached inclusion over the years. These include scholars who have explored poverty and those who are concerned with the education of the differently abled. Researchers studying poverty—the distribution of wealth—in Europe have used the terms inclusion and exclusion (Byrne, 1999; Madanipour, Cars, & Allen, 1998; Munck, 2005). They perceive social injustice not just as a form of poverty but also as a multidimensional process comprised of a number of forms of exclusion. They have explored the ways in which people have access to current social, economic, political, or cultural systems, to participation in decision-making and political processes, to employment and material resources, and to integration in common cultural processes like education (Madanipour et al., 1998; Ryan, 2012; Walker & Walker, 1997). Within this perspective, men, women, and children are excluded when they are not able to obtain particular kinds of food, to partake in desired activities, or to simply live their lives like others do. This view emphasizes the structural nature of peoples' misfortunes and avoids blaming individuals. Proponents contend that structural processes rather than individuals and groups create barriers that prevent the inclusion of the poor, disempowered, and oppressed (Ryan).

Education scholars have also been concerned with inclusion and, in particular, the education of "special needs," "exceptional," or "differently abled" students (Ainscow, 2005; Booth, 1996; Lupart, 1998; Slee, 2001). Inclusion has become an issue because of the way in which educators and experts have understood, recognized, and valued those with exceptionalities. With few exceptions over the years, the latter blamed the difficulties that some students had with increasing standardizing school conventions on what they saw as their defective physical, behavioral, and cognitive abilities. In their view, school institutions were not the problem; the reason that these students were not performing well was because they were "backward," "slow," or "defective" (Slee). Their solution was to identify, segregate, and treat (fix) these students. This segregation has, however, not worked out for these students. It has neither equipped them to exercise their rights as citizens nor to accept their responsibilities (Slee). Instead, this segregation excludes these students from the best of what schools have to offer. This is why many advocate that school systems abandon this segregation and include exceptional students in the regular stream schooling (Ryan, 2010b).

Other scholars who are concerned with the troubles of students with exceptionalities have also recognized that they are not the only ones who are excluded from traditionally organized school systems; others are systemically excluded because of the ways in which they are recognized. Those who look at the issue from an international perspective have acknowledged that students can be excluded by virtue of their association with categories other than exceptionality (Ainscow, 2005; UNESCO, 2003). Ainscow, for example, notes that students can be excluded as a consequence of race, social class, ethnic, religious, and gender relationships, in addition to ability. In order to counter these debilitating relationships, he contends that school communities need to welcome diversity among all learners, and not just focus on those with exceptionalities. Lupart (1998) refers to this perspective as the "minority group" concept. It also coincides with the view of other inclusive-minded scholars in education who recognize that race, class, gender, etc., relationships can also be exclusive (Dei, James, Karumancherry, James-Wilson, & Zine, 2000; Riley & Rustique-Forrester, 2002; Ryan, 2006a, 2006c).

Inclusion is intimately associated with issues of recognition and distribution. Individuals or groups are included (or excluded) by virtue of the ways in which they are recognized as well as the extent to which they have access to goods, rights, and responsibilities. In the spirit of these views then, it is useful to think of inclusion in education as a process that (1) targets exclusive systemic practices, such as ableism, classism, sexism, racism, and homophobia; (2) emphasizes the importance of access, participation, recognition, and achievement of all students; and (3) advocates for the meaningful participation of all members of school communities in the decision- and policy-making activities of schools and school systems (Ryan, 2010b, 2012). Leadership has an important part to play in these processes.

Leadership and Inclusion

The idea and practice of leadership is not always consistent with inclusion. Of course, the extent of this consistency depends on the way in which leadership is conceived. Some views of leadership mesh nicely with inclusion, while others do not. Many of the more traditional management-oriented perspectives, for example, are at odds with inclusion. Their inherent hierarchies draw a distinction between those in positions of responsibility and those who are not. The former are imbued with power, while the latter are divested of it. This means that those who are not in administrative positions are routinely excluded from organizational functions like decision-making. Proponents of these perspectives believe that this exclusion is appropriate, assuming that these individuals do not have the capacity to engage in these practices in a way that would benefit organizations (Ryan, 2012). Management-oriented tendencies to promote efficiency and productivity are also not consistent with inclusion and social justice (Blackmore, 1999; Marshall, 2004). Their preoccupation with the former values deflects attention away from efforts to promote inclusion.

Not all leadership perspectives are at odds with inclusion. Indeed, a number of leadership approaches go a long way in promoting inclusion. Their proponents rightly take issue with the hierarchies that accompany bureaucratic forms of organization. Corson (1996), for example, contends that these hierarchies both reflect and reinforce wider societal hierarchies and injustices. Others have pointed out class and gender hierarchies in organizations (Blackmore, 1989; Grace, 2008). They contend that hierarchical divisions of labor in organizations revolve around class and gender distinctions and that these are also tied to a corporate management view that strives for power and control (Blackmore, 1999; Grundy, 1993; Ozga, 1993). These scholars emphasize that hierarchies impede inclusion. Inclusive forms of leadership, on the other hand, foster equitable, heterarchical, and horizontal relationships that transcend global race, class, and gender divisions and hierarchies (Ryan, 2012).

Inclusion-friendly leadership perspectives are consistent with collective enterprises. This tendency contrasts with a common view that assumes that leadership naturally rests with particular individuals. There are a number of problems with this individualistic approach to leadership. The first and most obvious is that it is exclusive. Investing leadership in the hands of one individual excludes others who are not considered leaders (Foster, 1989; Ryan, 2003a, 2003b, 2006a). Another difficulty with this individualistic perspective is that when powerful leaders move on to other organizations, they leave power vacuums and accompanying problems behind (Hargreaves & Fink, 2006). Still others point out that it does not make sense to rely on single individuals when their influence is generally limited. These scholars contend that leadership power is distributed or "stretched over" a range of artifacts, tools, language, people, and relationships (Spillane & Orlina, 2005). Proponents of what has come to be known as distributed leadership contend that significant change in organizations generally occurs not as a consequence of single individuals working alone, but from the efforts of a variety people working in different capacities and using a range of resources (Gronn, 2002; Leithwood, Jantzi, & Steinbach, 1999; Pounder, Ogawa, & Adams, 1995; Smylie, Conley, & Marks, 2002; Spillane & Orlina, 2005). Distributed leadership perspectives are inclusive in the sense that they see value in including a variety of people in the leadership process.

But distributed and other similar approaches to leadership, like some versions of teacher leadership, do not go far enough in ensuring inclusion. In this regard, they fail to attend to the ends for which leadership is organized. While distributed leadership argues for a collective approach, it nevertheless fails to specify the ends for which these collective enterprises should strive. Other leadership perspectives are more inclusive in this regard. Emancipatory leadership proponents (Foster, 1989; Marshall, 2004), for example, believe that leadership is only one element in the pursuit of social justice and inclusion. They feel that leadership-related activities, like decision- and policy-making, are only one part of a larger enterprise that looks to make the world a just place. Leadership scholars who work in the area of the differently abled also make a case for attending to a specific inclusive goal (Keys, Hanley-Maxwell, & Capper, 1999). They openly advocate for the inclusion of differently abled students in school activities. The bottom line here is that leadership can never be truly inclusive unless the ends for which it is organized are also inclusive (Ryan, 2012). Over the years, administrators of diverse schools have employed a number of practices to promote inclusive practices in their schools.

The Practice of Inclusive Leadership

Scholars and other experts have much to say about leadership and inclusion. But they are not the only ones who recognize the value of inclusion. Many practitioners—teachers and administrators as well as students, parents, and community members—also promote the idea and practice of inclusive leadership. But unlike many scholars, they are intimately involved in the practice of it. Putting these inclusive practices into place, however, does not come easily; many struggle in their efforts to promote inclusion (Ryan, 2010a). These struggles emerge as members of school communities attempt to promote inclusion in the ways they communicate with others, look critically at their environments, work with their communities, use their political skills to advocate for inclusion, and work to change exclusive structures. Understanding these struggles, however, requires an understanding of the obstacles that advocates of inclusion encounter.

Obstacles to Inclusive Leadership

It is not always easy to put inclusive practices into place. This is because, as mentioned above, many obstacles can get in the way. These obstacles can take many forms, including policies, practices, and the attitudes of many men and women. Most of these exclusive practices, however, are associated with the exclusive cultural context in which education occurs. Exclusion and privilege have been with us for some time—from feudal times to the present. These enduring disparities between rich and poor, privileged and marginalized, and included and excluded shape the fortunes of students in contemporary education systems. Most obviously, these differences have not served the children of the marginalized well. They perform less well, are more likely to drop out of school before graduation, and are less likely to go on to postsecondary than their more privileged counterparts. Those who do end up attending postsecondary institutions tend to enroll in vocational institutions or 2-year programs (Coleman et al., 1966; Natriello et al., 1990).

Over the past few decades, differences between the privileged and marginalized have increased even more, despite the mid-twentieth-century improvements in life conditions in the Western world (Tabb, 2003). This is due, in large part, to the recent introduction of neoliberal policies and practices that are geared to liberate "individual entrepreneurial freedoms and skills within an institutional framework characterized by strong property rights, free markets and free trade" (Harvey, 2005, p. 2). The neoliberal preoccupation with market principles shows up in education in a number of policies and practices. Some of these revolve around corporatization, marketization, and privatization initiatives (Anderson, 2009). Perhaps the most pervasive neoliberal policies/practices, however, have been those that involve the standardizing of curricula and pedagogy and, most importantly, testing.

Inclusive-minded leaders will encounter significant obstacles to inclusion in contemporary accountability and testing regimes. This is because these practices and policies are inherently exclusive. Contemporary standardized testing excludes already-marginalized students. To begin with, the tests themselves are often exclusive. Most are designed from a Eurocentric perspective and include items that presume that test-takers will possess knowledge that people who live in the Western world would normally take for granted (Ryan, 2006a, 2006c, 2012). Exclusion also occurs as schools prepare for the tests. Intense pressure to ensure that students do well on these tests often compels teachers to desert pedagogy designed to help marginalized students and to redirect their efforts to mid-level students whom they believe are capable of passing the tests (Hursh, 2007). Students are also excluded as schools maneuver to show well on the tests. Among other things, schools will exempt the poorest performing students from the tests by labeling them as "special education." They also prevent poorly performing students from moving up to the grade level where testing takes place. Many of these students give up and drop out of school (Darling-Hammond, 2010).

Inclusive-minded educators also find it challenging to promote inclusion in the hierarchical organizations in which they work. In most schools in the Western world, policy dictates that responsibility for what happens in the building rests exclusively with principals or head teachers. They are generally responsible not only for schedules, budgets, and student safety but also for more trivial matters, like ensuring that the drink machine in the cafeteria is working. These administrators will bear the brunt of the blame when things go wrong, so it is not always easy for them to trust others to make decisions in areas for which they are responsible (Ryan, 2006a). Recent managerial approaches, sometimes referred to as the new managerialism, only reinforce these hierarchies, moving meaningful decisions away from supposedly untrustworthy lower-echelon administrators and teachers who are expected to enforce policies, but not design, interpret, or question them (Gewirtz & Ball, 2000).

Inclusive-minded educators sometimes identify the people with whom they work as the source of obstacles to inclusion (Griffiths, 2010; Ryan, 2010a, 2010b, 2012; Theoharis, 2007). Principal among these resistors are teachers. Griffiths (2010), Ryan (2010a, 2010b), and Theoharis (2007), for example, contend that teachers may routinely oppose inclusive initiatives, such as including differently abled students in mainstream classrooms, including students and parents in decision-making, and various initiatives designed to address racism and sexism. Resistance to inclusion also can come from the parent community, particularly the more affluent white middle-class element (Theoharis). These parents may oppose initiatives that they perceive may not work for their own children, even though they may assist other less privileged children. Resistance also originates in the district and beyond. Leaders may find themselves up against unsupportive central office administrators, inflexible bureaucracies, hostile colleagues, a lack of resources, harmful government politics, and uninspired administrator preparation (Theoharis). Finally, resistance may also often come from inclusive-minded leaders themselves. They may unwittingly support initiatives and practices that undermine their own inclusive agendas (Ryan, 2012).

Administrators must do their work in the context of this resistance. While these obstacles may often make it challenging to achieve inclusive goals, many inclusive-minded administrators persist. They engage in a number of practices that they believe will promote inclusion in their schools. Communication is one area that they target.

Communicating with Others

Inclusive-minded leaders look to communication strategies to help them with their efforts to promote inclusion in their schools. While communication is important in any school, it is particularly crucial in the increasingly diverse school settings around the world. It is not always easy for administrators to understand others who see the world in different ways, and help them participate fully in communication practices and in school activities in these contexts. So leaders need to communicate in ways that provide bridges that bring together disparate and different communities and enable them to overcome the powerful barriers that prevent them from sharing in what schools and communities have to offer. Among other things, the right communication practices can help overcome language and cultural differences and the variations in worldviews, values, and power that generally accompany diversity.

Administrators speak about inclusive communication strategies in a least two ways (Ryan, 2002a, 2003a, 2007, 2011, 2012; Ryan & Rottmann, 2009). One is in terms of communication practices themselves and the other is in the ends for which communication is employed. Many recognize the challenges that accompany communication efforts, particularly in diverse settings, and work to ensure that school communication practices are inclusive. In this regard, the type of communication many favor is dialogue. Many inclusive-minded leaders believe that communication with their various constituencies is best achieved when everyone is meaningfully included in the two-way interchange characteristic of dialogue. For these administrators, dialogical interaction is the first step in achieving more comprehensive inclusion within the school community.

Administrators do a number of things to encourage meaningful dialogue within their schools and school communities. Among other things, they work at establishing relationships, understanding others, and listening to people. Administrators acknowledge that they need first of all to provide the groundwork—the conditions—that makes dialogical interchanges possible. This requires that they cultivate relationships with people. This involves connecting with others in the school communities and developing and maintaining informal networks with various groups and individuals. In order to do this, administrators maintain that they have to make themselves visible and approachable. They have to take the initiative to put themselves in places where they will encounter others—this means coming out of their offices and meeting people in the halls, in classrooms, on the school grounds, and out in the community. It also means that they will have to present themselves in ways that will prompt others to want to engage in dialogue with them and to get others to trust, respect, appreciate, and like them (see also Burbules, 1993). To do this, administrators do such things as displaying their caring nature, vulnerability, and sense of humor (Ryan, 2012; Ryan & Rottmann, 2009).

Inclusive dialogue also requires that the partners understand one another. Administrators see understanding in two related ways: as knowledge of particular groups and as efforts to comprehend what others are saying in face-to-face conversations (Ryan, 2012; Ryan & Rottmann, 2009). One type of understanding complements the other. Administrators say that they do a number of things to understand the various groups that are part of their school communities. These include circulating surveys; consulting with staff members, parents, and community groups; and talking to various individuals in the community. Doing so enables them to build a picture of the groups so that they can be in a better position to decode what the latter attempt to communicate, particularly with regard to the groups whose first language is not English. In conversations with students, for example, knowledge of the group to which the student belongs allows administrators to read both verbal and nonverbal cues in order to ascertain whether they and their conversation partners have understood one another. Once the partners have understood one another, they can exchange information that enables them to gain more knowledge of the other.

Inclusive-minded leaders also pay particular attention to listening to what others have to say (Ryan, 2002a, 2006a). They recognize the importance of giving other people space to talk and do what they can to ensure that this happens. Administrators maintain that there are a number of things that they do. These include establishing eye contact, keeping in mind that this will not be appropriate in certain situations, and taking up a suitable distance from the audience. They also say that listeners also should avoid interrupting the speaker, compare the speaker's experience to their own, and ask questions. They also refrain from speaking too much. Levine-Rasky (1993) also cautions that in situations where there is a power difference between speakers, the more advantaged speaker needs to provide as much comfort as possible for the other partner so that they will be able to say what they have to. She goes on to say that listening in these situations should involve (1) a displacement of oneself as knower and evaluator, (2) abandoning the desire to assign relative worth to observations, (3) self-refection on privilege, (4) suspending personal authority, (5) a willingness to admit one's ignorance, and (6) abandoning temporarily one's identity.

The other way in which administrators speak of inclusion and communication is in the ways in which the latter can be used to promote inclusion. Many believe that the right communication practices can be used to expose and resist exclusive practices like sexism, racism, and classism. But administrators are positioned in ways that dictate that they also employ communication practices to achieve many other goals. Some of these goals are compatible with inclusion, but others are not. One of the positions that administrators frequently find themselves in is mediator (Ryan, 2007). This identity can support inclusion, but it can also impede it. For example, refereeing conflict can provide administrators with opportunities to even out unequal relationships. But the mediator position also carries with it a responsibility to legitimate the school's practices (Anderson, 1990). And so administrators may find themselves overriding their inclusive philosophies by prioritizing efforts to ensure harmony in their schools; doing such things as withholding information from teachers, students, and parents;

and (sometimes unwittingly) filtering this information when they do decide to share it. There are also times when administrators may attempt to impose meanings on communities for blatantly exclusive ends (Ryan, 2011).

Given the value that many administrators place on harmonious school environments, they may also use communication strategies to control what happens in schools, sometimes at the expense of inclusive practices. Indeed the quasi-markets in which some schools operate may impel administrators to use exclusive controlling practices to survive in these systems. Take the case of City Secondary School (Ryan & Rottmann, 2009). Faced with threats of school closure because of declining enrolment, it sought to attract students beyond its normal community boundaries by developing and advertising unique programs. As part of a reimaging campaign, it also sought to change the school's former unsavory reputation by instituting a new behavior policy. Toward this end, the inclusive-minded administrators employed a number of communication strategies. They circulated written documents, like newsletters, posters, signs, memos, surveys, and report cards, and employed technological devices like computers, phones and the public announcement (PA) system. They also employed dialogical approaches. At the beginning of the year, and at other times when the need arose, students and teachers would talk about the code. There were limits to the discussion, however. The discussion was not intended to pave the way for changes to the behavior code. Instead, it was seen as something that was carved in stone, and nothing that occurred in these discussions would change it. The code was not meant to accommodate the views or various perspectives of students' body or community members, and the purpose of the discussion was to make sure that students understood the school rules so that they would obey them and thus project an image of the school that would attract potential students.

Administrators also look to critical learning to promote inclusion.

Promoting Critical Learning

Learning is an important part of inclusion, particularly in diverse school settings. This is because administrators, teachers, students, and parents often know little about each other; about exclusive practices like racism, classism, and sexism; and about how to approach and implement inclusive practices (Ryan, 2003a, 2006a). In inclusive schools, everyone ideally acquires new knowledge, understandings, and attitudes, assuming the roles of both teacher and learner. In these roles, educators help students and parents understand the school, community, and existing opportunities, and students and parents help educators learn about students and their communities.

Educators engage in many types of learning activities to learn about the communities they serve and about the dynamics of inclusion. Many, though, admit that they do most of this type of learning informally. They say that this informal learning occurs on the job, mostly through their experience in schools, from their colleagues and from community members, and not as much from so-called expert sources and individuals from district offices and elsewhere (Ryan, 2003a). Administrators also value informal learning over formal training, although some maintain that they have acquired useful knowledge in workshops and conferences that connect directly with their day-to-day experiences. Unfortunately, university programs that attempt to make these kinds of connections in the area of inclusion are rare. Those programs that do manage to make these links generally display features like in-depth field-work, internships, and real-life situations (Herrity & Glassman, 1999). Other kinds of local- or school-based session that bring teachers and parents together to share their respective areas of experiences tend to generate more useful knowledge (Ryan, 2006a). Organization learning is another way to generate school-wide learning (Senge et al., 2000).

Other formal professional development activities designed specifically to help teachers deliver various kinds of inclusive education have had mixed results. They generally have a limited impact on teachers' ability to deliver such programs (Sleeter, 1993) and have had mixed results in changing their attitudes (Robertson, 1998). The success of these programs often depends on things like support for the program and the respective climates in the teachers' schools. Other programs favor methods that minimize confrontation (Gillborn, 1995). Advocates believe that confrontational tactics designed to combat racism, for example, tend to reinforce the guilt of many well-meaning whites, paralyzing them when issues of race arise, burying racism, creating resentment and anger, and putting an end to any meaningful discussion. The best results are achieved in schools that manage to find a balance that maintains pressure to reflect on current assumptions and practices without being confrontational in a way that merely reproduces and amplifies current conflict. This strategy acknowledges that people make mistakes and that these mistakes should be acknowledged and discussed in a constructive manner (Ryan, 2003a).

The type of education and understandings that school members acquire is also important. If they are to understand what needs to be done to promote inclusion, then administrators, teachers, students, and parents need to develop a form of critical consciousness (Ryan, 2003a, 2006a, 2006b). Critical understandings can help everyone understand the social circumstances in which they find themselves and, in particular, exclusive practices that are not always easy to identify. The latter are often so ingrained in daily life that educators may not pay much attention to them (Taylor, 2006). Indeed, it is not uncommon for teachers and administrators, for example, to display color, spiritual, and class blindness (Larson & Ovando, 2001; Shields, 2003). Critical skills can assist people to understand the basis of claims, the assumptions underlying assertions, and interests that motivate people to promote certain positions. They can help people to recognize unstated, implicit, and subtle points of view and the often-invisible or taken-for-granted conditions that provide the basis for exclusive stances and practices.

Developing a critical consciousness requires that school communities reflect on their ideas and practices. Critical reflecting involves consciously pausing, stepping back from daily routines, and inquiring into one's own and others' thoughts and actions. It is first and foremost a social activity, not just an act of an individual looking at his or her private self. Critical reflection involves critiques of social arrangements, but it, somewhat ironically, also necessarily occurs within these same social arrangements. The problem is that reflectors need to think in new and different ways, but they must do so by employing the resources that this social environment provides them with. The way for educators to break out of this confinement is to engage others—particularly different others—in critical conversations (Ryan, 2003a, 2006a). Such conversations can help school communities acknowledge, recognize, critique, and change the often-invisible practices that impede inclusion.

Administrators do a number of things to promote critical conversations (Ryan, 2006a). First, they can support an atmosphere that encourages critique. Members of school communities will be more willing to look critically at things if it is the norm, that is, part of the school's culture. Administrators can also help members critically reflect by sponsoring activities specifically designed for such purposes. These involve testing out platforms with diverse others, modeling, maintaining records of meetings and policy deliberations, examining case records and studies, utilizing two-column analyses that involve comparisons, employing various scenarios analyses, and participating in simulations and value audits (Coombs, 2002). Various arts-based methods, including a "jujitsu" technique (Ryan, 1999), can also be useful. Administrators can also stimulate critical conversations by asking questions like: "What is happening here?" "Who says this is the way things should be?" "What other purposes are being served?" "Whose voices are being excluded, denied and silenced?" "What prudent action can be adopted?" "Who can we enlist to support us?" (Smyth, 1996).

Administrators also focus their inclusive efforts on school-community relationships.

Fostering Inclusive School-Community Relationships

For schools to be truly inclusive, they need to include the wider community in their various activities. This is a particularly challenging task in diverse communities (Ryan, 2002b, 2003a). Inclusive-minded educators are not the only ones committed to this end, however. Many others also embrace the idea of including parents and community members. Rejecting past practices that endorsed the separation of school and community, both conservative and progressive proponents of recent school reform, for example, have sponsored changes that have paved the way for parents and community members to take up roles and responsibilities formerly assumed by professional educators. Many administrators also favor such practices. They do so in one of two ways—as a form of enablement or a type of empowerment (Lewis & Nakagawa, 1995). Advocates of the former look to give parents a voice in governance arrangements by altering structural arrangements. Proponents of the latter, on the other hand, do not see power differentials or unfair structures as a problem. Instead they believe that it is up to educational professionals to reach out to the community, providing incentives for parents to become involved in their children's education.

Overall principals in Ontario tend to be more concerned with enabling rather than empowering parents and community members (Ryan, 2002b, 2003a). Most attempt to make contact with individuals and groups, understand, and encourage them to become involved in their children's education in whatever way they can. They are less concerned with including parents in governance matters. The reason that principals concentrate on getting parents to participate is because of the gulf they see between schools' culture and the culture of many of the community groups. These mostly Anglo principals often know little of their languages, values, cultural practices, and attitudes toward education. Many community groups, on the other hand, frequently find the school culture puzzling. As a result, administrators believe that exchanging information with the community is vitally important.

Administrators employ a number of strategies to exchange information with their diverse communities (Ryan 2002b, 2003a). Some use handbooks and newsletters. Handbooks generally contain information about such things as school personnel, school programs, schedules, rules, and regulations. Most are employed at the high school level, generally sent home with students at the beginning of the year. Some high schools generate school newspapers, which, although directed at students, also prove to be a useful source of knowledge for parents. Elementary schools tend to use newsletters to heighten parents' awareness of the school. While many schools recognize the value of second (and third)-language newsletters, many do not have the resources to employ a language other than English. Schools also acquire information about the community by sending out questionnaires and surveys. They employ them to get a sense of their communities and to do other things, such as, create a school vision.

Administrators also speak of the value of directly interacting with parents. They do many things to forge relationships with parents and community members and organizations. Administrators learn that they need to be aware of interactional protocols and to approach key figures—"those in charge" with some communities or "elders" in others (Ryan, 2002b, 2003a). Initiating interactions is also important. Administrators do such things as waiting to interact with parents before and after school, going out into the community to see parents, and encouraging teachers to do the same. They also attempt to establish connections with religious, cultural, social service, and business groups. Perhaps the groups that they seek out most are the religious and cultural groups because connections with these groups can help them get to know the community better and vice versa.

Administrators employ a number of strategies for bringing parents and community members into contact with the school (Ryan, 2003a, 2006a). The most obvious is the traditional parent-teacher nights. Many administrators, however, find that these events tend not to attract many parents, particularly at the high school level. A few administrators employ other tactics, doing things like including students at these events. Others introduce other sorts of activities to attract parents who would not normally attend parent nights. These include orientation barbecues at the beginning of the school years and education sessions to help parents better understand the workings of the school. Administrators also claim that providing translation services, drop-in centers, and coffee hours also encourages parents to come to school.

Other initiatives include inviting parents to come into the school to help out with various tasks, such as, checking out library books, helping with lunch hour supervision, accompanying students on field trips, and using parents for their various areas of expertise. Finally, schools that offer English as a Second Language (ESL) tend to have a measure of success in bringing parents into the school to learn. The best way to get parents involved in the school is to have parental presence as a part of everyday activities; in these scenarios parents are comfortable coming and going as they like, becoming a natural part of the school landscape (May, 1994).

Administrators admit that it is more challenging to empower parents and community members than it is to enable them (Ryan, 2002b, 2003a). Most of those who do encourage parents to become involved in governance activities report poor results. They maintain, for example, that they have difficulty convincing parents to participate in school councils, particularly those parents from diverse cultural backgrounds (Hatcher, Troyna, & Gewirtz, 1996; Ryan, 2003a; Wang, 1995). Another issue that concerns administrators is school council influence issues. Councils tend to be dominated by middle-class Anglos (Chambers, 2001; Hatcher et al., 1996; Ryan, 2003a) and educators, including administrators, who possess more background knowledge and are able to master the abstract language used in these settings better than most parents (Leithwood et al., 1999; Malen & Ogawa, 1992). A final issue concerns the influence of the councils. In Ontario, for example, these councils only have an advisory role. Even so, some administrators maintain that they attempt to honor decisions taken by these councils.

Administrators also promote inclusion by advocating in strategic ways.

Exercising Strategic Advocacy

It is not always easy to encourage or implement inclusive practice in schools. This is because, as mentioned above, advocates of inclusive practice often encounter resistance. This is why advocates need to be prepared to actively promote inclusion. There are a number of things that leaders can do to advocate for inclusion and for those who are often excluded. These include imposing it, persuading people, and maneuvering and establishing links with marginalized groups. It is also important to advocate in strategic ways.

Administrators do many things to advocate for inclusion. One tactic is making inclusion nonnegotiable (Ryan, 2006a). In certain situations administrators may have no option but to insist that members of their school communities adhere to inclusive policies and practices (Keys et al., 1999). Imposing inclusion in an authoritative manner, however, is not an ideal strategy, even though there may be few other options in certain circumstances. To begin with, this sort of insistence contradicts the inclusive mandate; it is decidedly exclusive. Another problem with this path is that an administrator can only do this effectively when he or she has the power to do so. While administrators may hold a certain amount of positional power, this does not always translate to an ability to influence everything that goes on in schools.

The other related issue with this tactic is that it may nurture resistance where there was none before. Some people may decide to resist forceful overtures, and this can turn out to be a problem in cases where the person or people advocating for inclusion do not have the power to enforce it. A more ideal strategy is to have people embrace inclusion on their own.

One way to get people to voluntarily accept inclusive initiatives is to persuade them. To do so, administrators employ various techniques to convince school or community members of the value of equity programs or prompt central office administrators to support a policy initiative or give them much needed resources. They use various information-circulating techniques, modes of prompting, guided discussions, questioning, and provoking and adopt various arguments to get their points across (Ryan, 2010a). Administrators also supply academic articles and student performance data for educators to mull over and make available stories, videos, and people's experiences to get their teachers, parents, and students to buy into their ideas about equity. Many note that it is important to use appropriate language and that the best way of getting their points across is not to preach but to present their positions in ways that their audiences accept them on their own.

Another way to promote inclusive agendas is to establish links with like-minded groups and individuals. This is not always easy to do in a neoliberal world that values individualism and market competition and sets people against one another (Ryan, 2012). Even so, inclusive-minded administrators will be more likely to be open to various overtures, requests, and new initiatives if they have good working relationships with people with whom they work. People will also be more likely to listen to and embrace inclusive ideas from administrators whom they trust. Inclusive-minded educators are likely to find like-minded individuals among disadvantaged groups. So it is in their interests to work with these groups to adopt strategies associated with social movements, including creating networks that support local activism, framing stories about the network's identity and purpose, and developing means to acquire resources necessary to advance the group's goals (Oakes & Lipton, 2002).

As ideal as the former strategies may be, it may not always be possible to persuade people to embrace inclusion. In these cases, it may be necessary to do more than present lucid cases to resisters. Administrators will need to adopt other more aggressive strategies. These include trading and bargaining. They may find that in order to get what they want, they will have to give something up. Other strategies of this sort include stalling and maneuvering. Stalling make be necessary in instances when exclusive policies are foisted on school communities. Delaying can give those who are involved time to plan and mount campaigns to resist such practices. It can also give them time to explore alternate paths and explore other options (Ryan, 2006a).

While advocating is a key element in promoting inclusion, it needs to be done in a particular way in order to be successful. In other words, advocates of inclusion need to be strategic in the moves that they make. This requires them to be "political," that is, they need to engage in the micropolitics of their respective organizations (Ryan, 2010a). If they choose to ignore this side of institutional life, they risk being marginalized, ignored, or, at the very least, unsuccessful in their inclusive initiatives. Administrators tend to fall into three groups when it comes to approaching micropolitics: some refuse, ignore, or are ignorant of them; others say that they prefer not to engage in micropolitics, but actually do so; the third group actively participates. Participating in micropolitics means that politically aware administrators are aware of the political environment around them and put this awareness strategically into practice.

Coming to an awareness of organizational micropolitics involves acquiring knowledge of organization dynamics. In this regard, it is crucial for administrators to understand school cultures, community dynamics, and the wider system idiosyncrasies. Understanding these realms requires that they come to know, or know about, the people who work in the system—teachers, parents, and central office people—and their values and priorities. This includes understanding the not-always-obvious system conventions and the people who occupy significant positions in the system. Political astute administrators say that it is important to know who has power, what kind of power they possess, and how they are likely to use this power. But power is not necessarily associated just with a person's formal organizational position, however. Instead, it is often a product of the kind of relationship people have with others. So, it is important for administrators to understand these kinds of relationships and the relationships that they have with these powerful others in order to know who is likely to support their initiatives and interests. For administrators one particularly effective strategy for getting to know people across school districts is to sit on district-wide committees (Ryan, 2010a).

Being strategic means carefully assessing situations before deciding what strategies to employ, when to use them, and when to pull back. Politically minded leaders consider a number of factors before making the decision to act. These include, among other things, considering the history of the issue, who is involved at the time, whether the situation is "readable," and how much they can "push." They also recognize that there are situations where they need to pull back. Many administrators admit that they learn how to act strategically through their experience. Even so, some are more prepared to learn than others. More experienced principals are generally more tuned into their political environments and have a more acute sense of what to do to get their desired ends. Many of these administrators have learned a great deal over the years, much of it from the mistakes that they have made. Some have strategies for dealing with tricky situations. These include making notes of challenging events, storing them away, and consulting them when challenging situations arise.

Changing School Institutions

The task for inclusive-minded educational administrators and educators is a formidable one. They face many challenges in their quest to make schools more inclusive places. Perhaps the biggest challenge is changing the very structures that generate the obstacles to inclusion. Exclusion is deeply embedded in school structures; racism, sexism, classism, homophobia, and ableism, for example, continue to find their ways into schools and classrooms. But other structures also get in the way of inclusive changes. Long-standing organizational hierarchies and more recent quasi-market environments can exclude individuals and groups from decision-making processes and from various opportunities that schools have to offer. If schools are to change their exclusive structures, then they will need to move beyond the superficial changes on which many educators prefer to focus. They will need to change not just the obvious, more formal structures, like policies and rules, but also the more subtle, taken-for-granted, and informal exclusive patterns and practices that pervade schools. This, however, is not an easy thing to do.

There are things that administrators can do to promote inclusive practices in their schools. As this chapter has illustrated, they can employ communication practices, use critical learning strategies, foster school-community relationships, and exercise strategic advocacy. There are also other measures that they can employ to facilitate the transition to more inclusive institutions. Research (Blase & Blase, 1997, 1999, 2002; Bredeson, 1989; Crockenberg & Clark, 1979; Datnow & Castellano, 2001; Epp & MacNeil, 1997; Leithwood et al., 1999; Ryan, 2006a, 2006b, 2006c; Short & Greer, 1997) indicates that transition to inclusive arrangements moves along a little smoother if the following conditions are in place. These include: decision- and policy-making arrangements that give teachers, parents, and students real power; locally controlled processes that allow school members to frame a definition of empowerment; roles that are clearly specified, but not overly constraining; a climate that supports risk taking; processes for helping participants solve problems and manage conflict; a mechanism for providing adequate resources; schedules that allow everyone the extra time they need to participate in leadership activities; and an ongoing process for educating participants. There will be no guarantee that the presence of these conditions will enable a change to a more inclusive school environment, but the chances are that they will make such a transition more possible and less painful.

The other element that change-minded inclusive educators need to keep in mind is that school institutions are intimately associated with the local and global communities in which they are embedded. What happens outside school walls can, and most often will, have an impact on what goes on within schools. Neoliberal sensibilities, for example, continue to dominate economic practices on the international stage and to penetrate schools; racist, sexist, classist, etc., practices flourish around the world and in classrooms; and hierarchies abound everywhere. The consequence of this is that for enduring changes to happen in schools, the world outside will also have to change. And so educators have to also work on these external changes. They will have to educate their students to go forth and change the communities in which they live in, and they also need to do their own work with others to formulate and enact plans to resist the exclusive world around them. Only in this way can they bring about the desired inclusive changes in their own institutions.

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Chapter 22

Toward a Framework of Research and Practice for Social Justice Leadership: The Case of Cyprus

Michalinos Zembylas and Sotiroula Iasonos

Introduction

School leaders in the Republic of Cyprus (henceforth Cyprus), like those in many other countries, face the new reality of working with children who speak a variety of languages and bring with them different cultural values and practices. With increased migration in Europe and around the world, diversity creates new challenges in schools and has a major impact on the work of school leaders (Billot, Goddard, & Cranston, 2007). Existing scholarship draws attention to the important role that school leaders play and emphasizes the need for leadership studies that "identify the particularity and diversity of cultural and contextual conditions within which leadership takes place" (Dimmock & Walker, 2005, p. 2). However, recent calls by a number of scholars in educational leadership point out the scarcity of studies that investigate issues of diversity and multiculturalism, particularly in relation to *social justice* concerns (e.g., see Coleman & Cardno, 2006; Goddard, 2007; Marshall, 2004; Theoharis, 2009).

During the past two decades, the term "social justice" has often appeared in numerous publications in the field of education (North, 2006). The fact that education has taken interest in the notion of social justice, points out North, is the result of recognizing that social justice issues are directly relevant to fundamental changes that are taking place in society and in schools. These changes include the growing diversity of school populations, the increasingly documented issue of gap between the performance of minority children and that of children belonging to the majority culture, as well as the proliferation of social inequalities and economic disparities as those unfold in schools on a daily basis (Bates, 2006). As it is pointed out, the meaning of social justice changes, depending on the different perspectives and social theories

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in which understandings of social justice are grounded (Zajda, Majhanovich, & Rust, 2006). As further noted by Rizvi (1998), there isn't a single meaning of social justice, but rather social justice "is embedded within discourses that are historically constituted and that are sites of conflicting and divergent political endeavors" (p. 47). Not surprisingly, the different interpretations of social justice reflect "the contested and competing interpretation of the term in a culturally and ideologically diverse world" (Zajda et al., p. 13).

This chapter seeks to explore the lack of engagement with the notion of "educational leadership for social justice" in Cyprus. It may sound surprising that there has not been any research on educational leadership for social justice in Cyprus so far, but some explanations will be discussed in consideration of the social and political circumstances of this country. Cyprus remains a deeply divided society since 1974, when Turkey invaded and still occupies the north part of the country. In addition, the increasing number of immigrants during the last few years adds another complexity in the social and political reality in Cyprus. Although one might expect that issues of educational leadership for social justice would be taken up as an important line of research and practice—e.g., issues of justice, equality, and human rights could also be raised in relation to the unresolved political problem of Cyprus and increasing immigration—the reality has been rather different. Therefore, our goal is to seek some understanding of why social justice leadership has not been explored so far in the context of Cyprus and then to develop an initial theoretical framework and a plan of action that can promote research and practice for social justice leadership in the future.

The first part of the chapter reviews briefly how we perceive the notion of social justice (education) and its link to educational leadership, particularly in relation to issues of multiculturalism. The next part of the chapter focuses on how the link between multiculturalism and school leadership is manifest in Cyprus and discusses the prospects of "social justice leadership" in the context of a divided society. The final part of the chapter describes our suggested framework to advance research and practice on social justice leadership in light of the social and political circumstances in this society.

Social Justice (Education), Educational Leadership, and Multiculturalism

Many definitions of "social justice" refer to an "egalitarian society that is based on the principles of equality and solidarity, that understands and values human rights, and that recognizes the dignity of every human being" (Zajda et al., 2006, p. 10). Social justice is "democratic and participatory, inclusive and affirming of human agency and human capacities for working collaboratively to create change" (Bell, 1997, p. 4) with the objective of "full and equal participation of all groups in a society that is mutually shaped to meet their needs" (ibid, p. 3). Given that in every society the principles of solidarity, equality, human rights, and political participation are manifest differently(Artiles, Bal, & Thorius, 2010; Loewen & Pollard, 2010), we adopt the idea that social justice is not a fixed state, time, or place to "arrive" at (Quin, 2009) but rather a *process* and an *objective* that is contextually based.

If the meaning of social justice is largely contextual, then achieving social justice is very much related to the social and political circumstances that exist within a particular setting (Quin, 2009). The influence of social and political challenges—such as, for example, ethnic or religious conflict and/or increasing immigration in a society—is evident not only in the everyday practices of division and marginalization of certain groups but also in the "unconscious reactions, habits and stereotypes that reproduce the oppression" of these groups (Young, 1990, p. 150) and prevent forms of empowerment and inclusion of others (Ahmed, 2004). These forms of disempowerment and exclusion may not leave much room for the success of educational activities that encourage equal participation, knowledge of social injustice, and action to promote principles of solidarity, equality, and human rights. Although the notion of "social justice" is often utilized by educators, educational researchers, and school leaders in their talk and writing, there is not always a reflection on its social, cultural, economic, and political significance and implications (North, 2006).

In particular, *social justice education* is the education that acknowledges the social, cultural, economic, and political significance of social justice and serves as a foundation of providing opportunities for students which have two aims: first, social justice education equips students with knowledge and skills to strengthen their struggle against social inequality and exclusion, and second, it encourages the students' active engagement with the social and political problems of their society so that they participate in the solutions of these problems (Indrašienė & Merfeldaitė, 2010). Social justice education, as further noted by North (2006), "should both teach students how to examine critically and in sustained ways the relationships among and consequences of White supremacy, patriarchy, and advanced capitalism and help them translate these critiques into collective, transformative political action" (p. 515).

Carlisle, Jackson, and George (2006) write that under the principles of social justice education the school, and especially school leaders, must promote inclusion and equality within the school setting and the wider community and must address all forms of social oppression being encountered. A socially just school leader provides a diverse and challenging learning environment that supports learning development, maintaining high expectations for the entire student population. Moreover, a socially just school follows a system-wide approach, whereby "the mission, resource allocation structures, policies and procedures, and physical environment, exemplify its commitment to creating and sustaining a socially just environment between and among various constituency groups and in all areas of the system" (ibid, p. 57). According to Quin (2009), for social justice education to become reality, the school leaders, teachers, and students need to be empowered and enabled to act in anti-oppressive ways toward social justice, not act justly or fairly only.

Particularly in relation to issues of diversity and multiculturalism, social scientists and educators argue that schools, teachers, and educational leaders should be responsive to diversity within their communities (Day, Harris, Hadfield, Tolley, & Beresford, 2003). Despite this seemingly progressive stance, the discourse of diversity and multiculturalism “has been mobilized and operationalized in educational policy and practice within market and managerialist frames that tend to limit the possibilities of delivering its promise of more inclusive and equitable schooling” (Blackmore, 2006, p. 182). According to Blackmore, neoliberal managerialist discourses have a negative effect on multicultural approaches in schools because neoliberal discourses privilege learning for self-interest and leadership as an individual accomplishment rather than a collective practice. Consequently, dominant discourses of multicultural education reforms in Western societies are more in alignment with the deregulatory aspects of the increasingly managerial and market orientation of schooling, dismissing social concerns about social justice, transformation, and the reduction of inequality (Gewirtz & Ball, 2000). The standards movement, the privatization of education, and the growing achievement gap between privileged and underprivileged students are only few of the issues affecting leadership in relation to multiculturalism and social justice (Cambron-McCabe, & McCarthy, 2005). It is these issues that have gradually constituted multiculturalism a “risky business” for school leaders favoring high scores in student outcomes as evidence of success (Blackmore, 2006).

The different discourses on educational leadership in relation to multiculturalism and diversity may be classified under two main approaches. On one hand, there is the discourse of *managing diversity* and multiculturalism that is based on maximizing individual potential so that recognizing and using diversity/multiculturalism adds value in terms of students’ learning (Blackmore, 2006; Gunter, 2006). The aim is to assimilate differences through celebratory practices of diversity, multiculturalism, and heterogeneity. The structural inequalities and disadvantages are not recognized and concerns about social justice, equity, and care are put aside (Gewirtz & Ball, 2000). School management through funding based on enrolments and a market focus on comparable national and international performances as measured by standardized educational outcomes are indications of the commoditization of education and the inability of school leaders to deliver equity (Blackmore). This market radicalism and the reduction of funding in education ignores equity implications, increases accountability demands for compliance on outcomes, and loosens compliance with regard to equity and social justice (Gewirtz, 2002). Such policies tend to promote a trend for “like” students to concentrate in particular schools and thus promote social exclusion. As Blackmore writes: “Diversity framed by neo-liberal discourse of choice is thus reduced to meeting the preferences of individual choosers in terms of offering a diversity of schools and programs, while ignoring how some have more choices, or how choice facilitates any disposition to be with those ‘like themselves’” (p. 188).

On the other hand, there is the discourse premised on *social justice* and critical transformative perspectives on multiculturalism as values placed at the heart of educational leadership (Gewirtz, 1998; Greenfield & Ribbins, 1993; Hodgkinson, 1991). In their review of literature on educational leadership and social justice, Larson and Murtadha (2002) call for school leaders to collectively work toward *social justice leadership*. Social justice leadership means that school leaders make issues of social inclusion and multiculturalism (race, class, gender, disability, and other historically marginalized conditions) central to their leadership practice and vision (Theoharis, 2007, 2009). Taking this approach enables questions to be asked about how social, cultural, political, and economic advantages and disadvantages are replicated in school organizational structures and cultures. The purpose for school leaders from this standpoint is to achieve more equitable outcomes for all (Blackmore, 2006). Contrary to managing diversity discourse's assimilationist view, social justice leadership does not simply recognize and respect difference rather than assimilating it but also struggles for more equitable redistribution of resources (see also Gewirtz, 1998; Theoharis, 2007).

This brief review on how social justice (education), multiculturalism, and educational leadership are entangled forms an important theoretical background for the study of social justice leadership in the social and political context of Cyprus. We particularly want to highlight two aspects of this entanglement: first, educational leadership for social justice within a society that is not only increasingly multiculturalist but also ethnically divided can and should be viewed as an important vehicle for enhancing the capabilities of school leaders to promote ideas and practices based on equality, solidarity, and human rights for all, and second, educational leadership for social justice within such a society needs to work toward a vision that encourages school leaders, teachers, and students to take an active stance and to take responsibility for social change on the basis of these common values (i.e., equality, solidarity, and human rights for all). The following part of the chapter discusses the link between multiculturalism and educational leadership in Cyprus and evaluates the prospects of social justice leadership in light of the particular social and political challenges in a troubled society.

Multiculturalism, Ethnic Conflict, and Educational Leadership in Cyprus: The Prospects of Social Justice Leadership

Cyprus has traditionally been a country of out-migration throughout the twentieth century, especially after the 1974 Turkish invasion that divided Cyprus into its north part (still occupied by Turkey) and its south part (the government-controlled area). However, migration of labor to the Republic of Cyprus started in the 1990s as a result of the relatively quick economic boom that has turned Cyprus into a host country for immigrants (Spyrou, 2009). Although there are no official figures, it is now estimated that migrant workers from different ethnic and racial backgrounds total between 60,000 and 80,000 (Trimikliniotis & Demetriou, 2009). The issue of growing immigration, however, is further complicated by the unresolved political problem—known as the "Cyprus Issue"—that raises serious security and other concerns. Cyprus remains a deeply divided and segregated society due to the protracted nature of the historical conflict between the two larger communities on the island, that is, the Greek Cypriots and the Turkish Cypriots. The ongoing division of the island since 1974 and the resulting consequences at the sociopolitical, economic, psychological, and other levels influence all aspects of everyday life in Cyprus. Although there has been a partial lift of restrictions in movement between the north part and the south part of Cyprus since 2003, the challenges of resolving the Cyprus Issue and reuniting the country remain.

The recent population differentiation in the Greek-Cypriot society as a result of increasing immigration has not come without a price. In the recently published fourth report of the European Commission for Cyprus against Racism and Intolerance (ECRI, 2011), there are many references to increasing xenophobia and racist attitudes toward immigrants, asylum seekers, and refugees expressed more openly than in the past in political discourses, the media, the workplace, schools, and everyday life. These references are also characterized by significant racial discrimination and exploitation with respect to housing as well as clear evidence of racist and xenophobic tendencies in the healthcare system. Along the same lines are the findings of the European Social Survey of 2007, which records the change or continuation in attitudes, behaviors, and values of European citizens in a range of social, political, and cultural issues, depicting Greek-Cypriot society as xenophobic and racist, with its citizens believing that the presence of people from other countries undermines the cultural life and traditions of the island.

Within this complex social and political context, the Greek-Cypriot educational system has not remained unaffected. Having always been based on a single culture as a result of the historical separation of education in the two ethnic communities, the Greek-Cypriot educational system has been affected by the great demographic changes which resulted in the profiles of the schools being changed as a consequence. The rise of immigrant students is reflected in the annual reports of the Ministry of Education and Culture over the last 15 years. While the percentage of "nonnative" students during the 1995–1996 school year was 4.41 %, this rate rose gradually to 13 % by 2011–2012; as a result, there is a growing number of "multicultural schools" (Zembylas, 2010b).

Despite the potential for local intervention and development of special programs at each school in the context of multicultural education, the Greek-Cypriot educational system is so centralized (Pashiardis, 2004) that for any substantive multicultural efforts to succeed, there has to be political will, funding, and direction from the Ministry of Education and Culture (Trimikliniotis, 2004). As Johnson et al. (2011) point out, "To date, the principal's role in Cyprus has mainly been conceptualized in terms of their influence on the mainstream student population" (p. 155) and further add:

> The reality is that most of the 455 school principals in Cyprus have had little formal preparation to understand and respond to the needs and perspectives of students and their families from culturally diverse backgrounds. This is particularly true in those schools with a small percentage of ethnic minority students because the policy on intercultural education does not provide for the introduction of special professional development in these settings. (ibid.)

A review of previous work on educational leadership in Cyprus suggests that there is little research activity investigating principals' approaches to cultural diversity, inclusion, and particularly social justice. Although there have been numerous investigations exploring school leadership models in Cyprus (e.g., Kythreotis, Pashiardis, & Kyriakides, 2010) and their relation to student achievement (e.g., Brauckmann & Pashiardis, 2011), very little work has been done to link leadership practices that promote inclusive education in Greek-Cypriot schools (for an exception see Angelides, 2011; Angelides, Antoniou, & Charalambous, 2010). However, none of this work makes any explicit connections between leadership and social justice.

Nevertheless, previous research findings lay the ground for further investigation and a possible combination of a model-building approach to leadership and social justice in the context of Cyprus. Pashiardis (2004), for instance, mentions that one of the characteristics of a successful leadership style is creating a democratic, egalitarian school that accommodates all students, regardless of their background. Also, there is evidence that inclusion can be promoted in Greek-Cypriot schools, if there are systematic efforts by principals toward developing a collaborative, participative, and inclusive school culture (Angelides, 2011; Angelides et al., 2010). A broad understanding of inclusive education in terms of efforts to overcome obstacles that prevent the participation of all children in schools, regardless of race, gender, social background, sexuality, disability, or attainment (Ainscow, Booth, & Dyson, 2006), reflects social justice concerns (Lingard & Mills, 2007). Once again, however, there is no empirical evidence in Cyprus that *shows* the relationship between social justice leadership and inclusive education.

In our own work (e.g., Zembylas, 2010c; Zembylas & Iasonos, 2010), we have suggested that there is inadequate leadership preparation for cultural diversity and social justice in Cyprus. A qualitative research study that we conducted with 17 school principals of multicultural primary schools in Cyprus during the 2008–2009 school year investigated primary school principals' approaches to diversity and multiculturalism and the relationship of these approaches to the principals' leadership styles. The study found that there was a close relationship between a conservative approach to multiculturalism and transactional leadership, a finding representing approximately half of the sample. The study also discovered that the pursuit of uniformity and maintenance of the status quo was an important aspect of this group of principals' understanding of conservative approach to multiculturalism and transactional leadership.

There are a number of reasons why the majority of school principals may adopt conservative ideas in Cyprus when it comes to issues of multiculturalism. Firstly, the centralized educational system of Cyprus seems to encourage a transactional model of leadership (see Pashiardis, 2007), and so it appears that the application of assimilationist policies creates a restrictive environment for school leaders and teachers alike. The underlying assumptions of these policies appear to be politically conservative, and thus it is not surprising that a large number of principals adopt conservative multiculturalism attitudes (see Aveling, 2007). This assimilationist view of multiculturalism is clearly associated with the approach of "managing diversity" that has been discussed earlier. In addition, the Greek-Cypriot educational system may not have at the moment some of the concerns that trouble Western societies (e.g., the standards movement), yet the achievement gap between native and ethnic minority students (see Theodosiou-Zipiti, West, & Lambrianou, 2011) and the increasing privatization of education provide serious obstacles in efforts to reduce inequality and discrimination.

Rizvi (1993) explains that most administrative work takes place in a conservative context that does not encourage radical reforms, especially when it comes to issues of diversity and multiculturalism. Most schools strive to find ways to get everyone to meet common goals and purposes (Ryan, 2003); after all, many principals in our study emphasized that minority students should "follow the curriculum of the country that hosts them temporarily." Even though many schools may on the surface promote values of diversity, democracy, and inclusion, "they actually operate under conditions that embody a competing set of values, like obedience, compliance, routine, conformity and homogeneity" (Ryan, p. 160). As Ryan maintains, the effects of this process into which school principals are socialized are enhanced by the investment they have in the system that have made it possible for them to acquire their current comparatively elite positions. Therefore, it is unlikely that they entertain any considerations of radical change. Likewise, many principals in Cyprus do not seem comfortable with diversity and the fundamental changes to a system and a society in which they have an investment. Most principals are more likely to attribute problems to the presence of non-indigenous families in the society.

In addition, the unresolved political problem of Cyprus seems to create much uncertainty and skepticism among many Greek Cypriots, so they see immigrants, asylum seekers, and in general anyone who is not Greek-Cypriot through a very hostile lens (Zembylas, 2010a, b). The priority of Greek-Cypriot concerns for issues of human rights violations of their "own" community exclusively also prevents opportunities for solidarity and inclusion of other communities, including the immigrants and Turkish Cypriots (Spyrou, 2009; Zembylas, 2011). Unavoidably, the culture of avoidance to raise these issues for other groups and communities may add to our understanding why there is lack of interest for social justice matters in educational leadership. Additionally, the lack of public and educational discourses on social justice leadership may also be related to its leftist connotations and the fairly conservative political landscape in Cyprus (Zembylas, 2008); thus, it is possible that social justice leadership might be viewed suspiciously by conservative political parties and teacher organizations as an effort by the leftist political parties to impose their agenda in education.

On the other hand, it is encouraging that there is some evidence of a few school leaders who adopt critical perspectives and social justice leadership concerns (Zembylas, 2010c; Zembylas & Iasonos, 2010). These school leaders are open to change and more fundamentally embrace its prospect in terms of capitalizing on students' diversity. They see themselves as transformational agents who can make schooling an experience that enhances the social and academic development of all students. These principals also emphasize the importance of acknowledging social injustice and racism and critically analyzing their implications. They also maintain the need to teach empathy and critical thinking aimed at achieving understanding of differences in positive ways (Shields, 2004). This position is in line with the discourse premised on social justice and critical transformative approaches on multiculturalism and school leadership (Theoharis, 2009). The principals who adopt this discourse provide an important basis to explore the prospects of social justice leadership in Cyprus. Our goal in the remainder of this chapter is to offer readers our framework for a more systematic approach to research and practice of social justice leadership in Cyprus.

Toward a Framework for Research and Practice of Social Justice Leadership in Cyprus

As noted so far, existing research in Cyprus has documented multiple social and political challenges of educational leadership in an increasingly multicultural society with an unresolved ethnic conflict. As Blair (2002) suggests, strong leadership in multicultural contexts "implies the strength to deal with difficult and contentious issues and to critically examine those practices that are routinized or institutionalized in the school and to ask the crucial question, 'who is falling through the net or who is being served by our taken-for-granted ways of doing things'" (p. 185). Along similar lines, Giroux (1993) urges educational leaders to create a new language capable of asking new questions, raising new issues, and generating more critical leadership practices. In light of the added complexity of the political situation in Cyprus, future research and practice is needed in a number of areas, if a "grounded theory" of social justice leadership is going to be developed in this setting.

In adding to the growing body of literature on leadership for social justice in other countries, existing research and practice in Cyprus can be strengthened along a two-pronged framework:

1. The development of research that explores the complexities of the relationship between educational leadership and justice both in its political and its social dimensions; that is, it needs to be examined how social justice is viewed in Cyprus and how this view changes the role of educational leadership in preparing students to live as critical citizens.
2. The preparation and professional development of Greek-Cypriot school leaders needs to ensure that school leaders are equipped to support learning in heterogeneous, inclusive environments; that is, preparing school leaders to enact a social justice agenda in a divided society suggests that they acquire the knowledge and skills to enact resistance against the marginalization of particular students.

Table 22.1 shows a view of the framework which is analyzed and discussed below in more details.

Research Dimension

What clearly makes the context of Cyprus different from other countries is the unresolved ethnic conflict in combination with increasing multiculturalism that influences all aspects of social and political life. As noted by McGlynn (2008) and

Table 22.1 A framework for research and practice on social justice leadership in Cyprus

Dimension	New questions
Research	*How is (social) "justice" viewed in the context of Cyprus? Why?* *What dispositions and practices are needed to enact social justice leadership in an ethnically divided country?* *In which ways can school leaders reconcile the foundational objectives of the Greek-Cypriot educational system with the inclusion of multiple other diversities and issues of tension?*
Practice	*In what ways can school leaders participate in field-based inquiry on oppression and discrimination?* *How can successful principals of social justice be used as exemplary case studies?* *On which ideas should curricula and pedagogies be grounded to become more inclusive without putting aside contentious issues?* *How can school leaders acquire the knowledge and skills to enact resistance against racism and nationalism in schools?*

McGlynn and London (2011), there is evidence that ethnic or religious conflict adds several layers of complexity when it comes to educational leadership issues. For example, hegemonic racialization and nationalization practices within a divided society often prevent other concerns (e.g., social justice, solidarity for others who don't belong to the same religious or ethnic group) from finding their well-deserved place into school discourses and everyday practices. However, further research on how social justice leadership is enacted to sustain inclusive practices in a divided society can create "small openings" and "cracks" (Zembylas, 2008) that raise new questions (see Table 22.1) framed in social justice terms. Addressing these questions can inform our understanding of how school leaders may reconcile the foundational objectives of the Greek-Cypriot educational system—which seems to perpetuate opposing ethnic or religious identities (e.g., see Spyrou, 2009)—with the inclusion of multiple diversities, including children from the "enemy" community in Cyprus (i.e., the Turkish Cypriots).

In light of the suggested framework for Cyprus, there should be systematic research on the characteristics and practices of Greek-Cypriot school leaders who enact social justice leadership. It is important to identify principals who enact leadership for social justice, both successfully and unsuccessfully, while taking into consideration concerns about issues of identity, culture, and conflict in Cyprus. In this way, the characteristics of social justice leadership will be "localized" within the existing realities of the Greek-Cypriot educational system. For example, our framework recognizes the potential tensions between understandings of "justice"—viewed through the lens of the ongoing violation of human rights in divided Cyprus—and the goal of *social* justice as the requirement to live in heterogeneous, inclusive cultures. Some unresolved questions emanating from previous studies (see Zembylas, 2011) are, for instance: Should school leadership policy and practice be grounded on the basis of violations of human rights or should it be guided by principles of solidarity and social justice? Who decides this and how should an educational system handle issues of contentious interpretations around justice, social justice, inclusion, and political conflict? How can school leaders respond in ways that do not further paralyze themselves to act in (socially) just ways?

In planning to implement this framework in the near future, our goal is to identify school leaders who enact social justice leadership through conducting initial interviews and questionnaires with school principals of multicultural schools in Cyprus. Also, ethnographic observations and individual and group interviews will be conducted, and various documents will be reviewed and analyzed within each school setting. Once the principals who enact social justice leadership are identified, the next stage will be the development of case studies in order to highlight the characteristics of each principal within the workplace in which he/she performs his/her duties (e.g., the practices and discourses utilized), including the collection of data from various other groups such as teachers, students, parents, and members of the wider communities. The case studies will be used to write up short stories, scenarios, and other documents, identifying the "best practices" of social justice leadership so that they can inform professional development programs for all school leaders in Cyprus.

Practice Dimension

To promote a social justice agenda for educational leadership preparation programs in Cyprus, future school leaders need to be provided with explicit opportunities to critically reflect on their values and practices as well as their impact on the communities living in this setting (cf. Scheurich & Skrla, 2003). For example, these opportunities may include a range of ideas: participating in field-based inquiry on oppression and discrimination in Cyprus, identifying successful principals in schools in which social justice is at the center of learning and leadership, organizing workshops that recognize the contentious issues in the context of divided Cyprus and analyze how to respond to incidents of racism and nationalism in schools, and facilitating the creation and/or adaptation of inclusive curricula and pedagogies that respond to the complexities of the local context (cf. Billot et al., 2007; Pounder, Reitzug, & Young, 2002). In other words, what is needed in educational leadership preparation programs in Cyprus is to prepare a new type of school leader who is strongly committed to achieving social justice and draws on many fields (e.g., curriculum, instruction, political theory, cultural studies, peace education) to enable this goal (Cambron-McCabe & McCarthy, 2005).

There are various professional development models from the literature that can be adapted and used together with local case studies of exemplary social justice school leaders. For example, one of these models is the one suggested by Capper, Theoharis, and Sebastian (2006) for preparatory programs that rely on both *horizontal* and *vertical* dimensions. The horizontal dimension refers to what school leaders must believe, know, and do to lead socially just schools; that is, it comprises of knowledge and skills that are necessary to develop critical citizens in the context of Cyprus. The vertical dimension refers to the curricula, pedagogies, and assessment methods that need to be developed to create socially just schools in Cyprus. Both dimensions are important aspects to have in mind when putting together professional development programs for social justice leadership in the context of a divided society.

All in all, we share the view that a professional development program is “not the starting point to each person’s journey as leader for equity and social justice, though it would likely be an important milestone” (Rodriguez & Baum, 2006, p. 134). Therefore, there should be a systematic effort to continue each professional program at each school setting, within which the school leader will be supported by the system’s mechanisms to tackle the different needs and problems faced in each case. Action research can be particularly helpful to understand the realities in which school leaders in Cyprus perform their duties, analyze and diagnose specific problems, and explore particular ways of resolving them in context in order to improve leadership practices of social justice (see Rizvi, 1998). Needless to say, the implementation of an action plan—for example, adapting the curriculum, changing assessment methods to make them more sensitive to minority groups, and implementing school projects to cultivate social justice values and practices—cannot be done by the school leader alone; rather it is a collaborative effort that involves teachers, students, parents, specialists, and all interested groups and communities (Angelides, 2011).

At both the systemic and the micro-school levels in Cyprus, processes must be established to facilitate conversations leading to reconceptualizing social justice leadership in light of the local complexities. Putting equity on the policy agenda; examining how present curricula, disciplinary policies, and enrolment strategies exclude some students; developing inclusive school cultures and organizations; enacting in everyday practices the values of fairness, justice, and solidarity; developing the school staff to nurture the development of all students; and establishing strong links between the school, parents, and the wider communities are some recommendations that can be promoted (see also Blackmore, 2006; Dimmock & Walker, 2005; Walker, 2005).

At the personal level, it is important to provide ongoing opportunities for critical reflexivity in which school leaders in Cyprus reflect and take responsibility on the impact of their actions on students and the wider communities. Through a new language and practice of critique, school leaders in Cyprus should gradually shape a new discourse with profound implications for social justice, diversity, and multiculturalism. In particular, we refer to the process of reflection in which the leaders will tackle specifically the challenge of linking accountability to equality (Allen, 2006), but also engage with critical self-assessment of the power they can exercise to challenge the social and political status quo (Zembylas, 2008).

A social justice leadership framework such as the one suggested here can prove valuable in the context of Cyprus to assess the impact of race, ethnicity, class, gender, poverty, and disability in the educational outcomes of all students (see Lalas & Valle, 2007). In fact, the concerns of social justice leadership with issues of equality, participation, solidarity, and human rights are similar to those expressed in the Greek-Cypriot literature regarding the unresolved political situation in

Cyprus (e.g., see Pashardis, 2007). Therefore, a framework of social justice leadership can help Greek-Cypriot school leaders gain valuable knowledge and skills on how to deal with different forms of inequalities and injustices in order to improve the learning performance of all students. Within such a framework, we believe that everyday school problems related to multiculturalism and social justice issues can be critically addressed and possibly ameliorated. We refer to problems associated with lack of genuine understanding and sensitivity on the part of teachers and "native" students (ECRI, 2011); the use of difference-blind ideology (Theodorou, 2011), including stereotyping, prejudice, and cultural misunderstandings (Papamichael, 2009); and the racialization and nationalization practices that marginalize students from other social, ethnic, and cultural backgrounds (Zembylas, 2010a, b). In this case, the problems will not be solved by the leaders who "attain degrees, licenses, and skills for top positions" (Marshall, 2004, p. 7) but also by those who have "the values stance and critical reasoning to blow the whistle when policies and programs cause harm" (ibid.), endorsing the fact that social justice as a perspective recognizes and respects differences rather than assimilates them (Blackmore, 2006).

Conclusion

This chapter has made an attempt to sketch a framework that could advance social justice leadership through research and practice in Cyprus. The basic principles on which this framework is grounded are the following: the development of school and community research and development projects that promote critical consciousness and deeper understandings of diversity, structural inequalities, and social injustices; the identification and recruitment of school leaders who possess a commitment to social justice; the systematic inclusion of social justice leadership ideas in leadership preparation programs; and the encouragement of school leaders to challenge the status quo in collaboration with their teachers, students, and the rest of the communities and to seek ways to promote solidarity, equal participation, and human rights for all.

The major barriers to social justice leadership in Cyprus have been the centralized educational system and the dominance of the public and educational agenda by the unresolved ethnic conflict. The uniqueness of the context of Cyprus is that it raises new questions about how social justice leadership can be enacted in a context of ethnic conflict. These questions may often situate justice and human rights concerns (as understood "locally") in opposition to social justice agendas, because "justice" is framed mostly in political rather than in social terms too; therefore, Cyprus provides a unique context to explore the challenges of how to reconcile the foundational goals of political justice in an ethnically divided society with the agenda of social inclusion. However, if Greek-Cypriot school leaders are convinced that there is convergence between the principles of social justice leadership and those of justice, solidarity, and human rights, then this would constitute an important first step toward social justice leadership.

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Chapter 23
Challenging Dominant Discourses of Home–School Partnerships in Indigenous Communities

Greer Johnson and Neil Dempster

Introduction

School leadership has taken an explicit turn towards leadership for learning in recent years (Swaffield & MacBeath, 2009). The latter concept moves towards a much more inclusive approach to teaching and learning than that implied by the term "instructional leadership", opening up possibilities for strong challenges to dominant discourses on leadership learning beyond the usual assumption that "schools know and do best". This alternative approach is generated from an understanding that social justice is a social activity. It begins with the knowledge that it looks different in various contexts. Intrinsically, social justice is not just the good intentions of morally mindful citizens, educators or families. Its distinguishing feature is that socially just actions are measurable by assessing the material differences evident in the lives of the people most impacted by unjust social practices.

This chapter reports on the project, *Principals as Literacy Leaders with Indigenous Communities*. This project offers new opportunities for Indigenous educators, families and communities to engage in a socially just approach to leadership for learning with their schools to make a difference in closing the divide between home and school learning. It is well known that Indigenous and low-socioeconomic families in general are least likely to be engaged in their children's formal schooling, for a range of reasons (Hanafin & Lynch, 2002; Jeynes, 2005; OECD, 2008). However, empirical evidence shows significant academic benefits when they are engaged (Bishop, 2011). We argue that in the Australian Indigenous schools and communities in which we are working, a leadership for learning model for assisting children to read in standard Australian English offers the prospect of better whole of life

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outcomes for the children involved. The focus of the chapter is to outline a new methodology whereby Indigenous Leadership Partners (henceforth ILPs) partner with primary school principals in 45 Australian schools to enable Indigenous students to read well. The model includes Literacy Leadership Mentors (LLMs; all former principals) who provide support for principals and ILPs to gather evidence about their current home–school contexts, plan a response to the most pressing issues found and then implement an evidence-based Reading Action Project (henceforth RAP) designed to change dominant patterns of leadership and to increase levels of reading in their schools.

Central to the success of this project is the acknowledgement of capacity in members of Indigenous communities to develop new ways of leading learning. The recognition by the project of the ILPs especially is particularly important, as those involved take up opportunities to encourage more Indigenous families to learn along with their children in their schools, homes and communities. In a project aimed at raising aspirations in a low-socioeconomic community in the United Kingdom, it was found to be important that those in traditional positions of leadership are prepared to enter into a model of shared leadership with community members (Waterhouse, 2010). A key point of difference between this approach and many others that have tried to change ways of leading to enhance student outcomes in Indigenous communities, both internationally and in Australia, is the pivotal place of agency afforded to the ILPs working at the interface between homes and schools: with school principals, teachers and families. We argue that in the opportunity for agency built into the role of the ILPs lies the possibility for sustained gains from the project well after its formal conclusion.

As a background to our work, we first provide an overview of literature that underpins the design of the project before we discuss examples of progress on this kind of work.

Leadership, Learning and Partnerships

Internationally, low-socioeconomic parents remain least likely to be involved in schools (Hanafin & Lynch, 2002; Jeynes, 2005; OECD, 2008). For Indigenous parents, underrepresentation in schools is even more pronounced. Many strategies to provide more access for families to schools have been based on foundational work conducted by Epstein (1995). Pushor and Murphy (2004) argue that comprehensive parent involvement in school frameworks generated from the key principles developed by Epstein have inadvertently perpetuated a deficit view of what marginalised families and communities have to offer in home–school partnerships. An early Australian example of a strategy to include marginalised families in home–school partnerships was the *Australian Disadvantaged Schools Program* (DSP), enacted from the Karmel Report (1973). This programme aimed at facilitating new opportunities for parents and communities to input into school curriculum design and implementation. For many non-mainstream families, this led to a hollow partnership in which schools set about educating those parents seen not to meet white, middle-class values and the expectations of the school system (McCaleb, 1994). This is an example of a deficit approach to addressing educational disadvantage.

A recent report, the *Australian Family–Schools Partnerships Framework* (Department of Education, Employment and Workplace Relations [DEEWR], 2008), prompts further critique of well-intentioned attempts to build home–school partnerships, especially in disadvantaged communities. The framework outlines 11 principles for schools looking to establish equitable partnership with families to support children's learning. Importantly, this framework not only acknowledges the importance of valuing knowledge that children bring to school from their homes and communities but also stresses the importance of parents' leadership in building, maintaining and renewing home–school partnerships. It is one of very few attempts by policymakers to reconsider the notion that "schools know best".

Supporting the policy shift evident in the Australian framework is an emergent home–school partnership research base (Saulwick Muller Social Research, 2006). For example, Spry and Graham (2009) have noted in particular, Catholic Education's attempts to move to more socially just, activist, home–school partnerships by focusing on parent leadership capacities across the social and educational spectrum. Internationally, for example, in New Zealand (Bull, Brooking, & Campbell, 2008), Canada (Clandinin, Pushor, & Murray Orr, 2007) and the United Kingdom (Harris & Goodall, 2007), there is an emerging shift from a focus on mainstream parents as corporate partners in school governance to various alternative forms of less academically able parental engagement, at school and in homes. In the United States, there is emerging evidence whereby socially just leadership has effectively disrupted dominant discourses of leadership and literacy. Central to progress, in developmental work with the Guatemalan Maya preliterate women in Lake Worth, Florida, has been the premise that the teaching of functional literacy in Spanish and English (so that the women could assist their children's schooling) was only part of emancipatory social action (Sena, Schoorman, & Bogotch, 2013). At least as important as "reading the word" were opportunities for the women to learn to "read the world", based on the tenets of critical literacy (Freire & Macedo, 1995). Accordingly, in reading their worlds, the women were encouraged to challenge the community's assumptions about health risks associated with HIV/AIDS. Further, the women were encouraged to lead others in their community through knowledge sharing with adults and children.

Such an example "engage[s] critically with the voices of the least represented beneficiaries … in the construction of reflexive alternatives" (Smyth, 2010, p. 113). This literature shows the beginnings of a more equitable approach to school partnerships with families, involving new ideas for shared leadership and responsibility for children's learning. The turn in the assumptions underpinning families' partnership with schools provides a counter-attack on deficit approaches through which marginalised families are seen as poor relatives in such partnerships.

The circumstances and terms upon which parents, especially those from low-socioeconomic zones, are expected to engage with schools have received little scrutiny (Warren, Hong, Rubin, & Uy, 2009). Furthermore, there is a lack of intervention research internationally about equitable and sustainable models for engaging low-socioeconomic parents authentically in schools and learning. Research and development is beginning to rely on distributed leadership (Bishop, 2011; Spillane, Halverson, & Diamond, 2001), parent leadership (Pushor & Ruitenberg, 2005), and principals' capacity to lead literacy in schools (Dempster & Johnson, 2006; Dempster et al., 2012). The Principals as Literacy Leaders with Indigenous Communities (PALLIC) Project to which we refer builds on research evidence to construct a sustainable model whereby Indigenous parents partner and share with schools the methods of improving student outcomes in reading in English.

The PALLIC Project as the means of bringing about such a partnership is the key focus of the chapter. We first outline some of the research in leadership on which the initiative is based. Second, we move to a discussion of the salient contributions from the research outlining what works in learning to read in Indigenous communities. Third, we provide a description of the PALLIC Project, explaining its design through reference to the pivotal relationship between the central trio of principals, ILPs and LLMs, before outlining the five professional learning modules through which the trio worked together with academics over 12 months during 2011 and 2012. Included in the third section is a discussion of a shared research agenda. In this agenda, principals, ILPs and the academic team will collaborate to evaluate the impact that the PALLIC strategy has had on building equitable family–school partnerships intent on progressing reading in 45 Indigenous sites. Fourth, we provide a snapshot of some of the emerging good news stories from the project to this point. Finally, we return to the methodology and initial outcomes from the project. We confirm our position that the project design, generated as it is from what the literature says works for leadership, parent engagement in schools and the teaching of reading in Indigenous communities, argues for projects such as PALLIC as a viable methodology for a socially just means of sustaining family–school partnerships: partnerships that might be applied to learning needs beyond the teaching of reading.

Section 1: Research in Leadership to Support PALLIC

Before describing the PALLIC Project as a positive strategy in Section 3, we first outline some of the research in social justice leadership and reading on which the project is based.

An Informing Position on Social Justice Leadership Research

A clear emphasis in the literature of the last decade has been on leadership defined not as a position, but as activity involving human beings working together on a

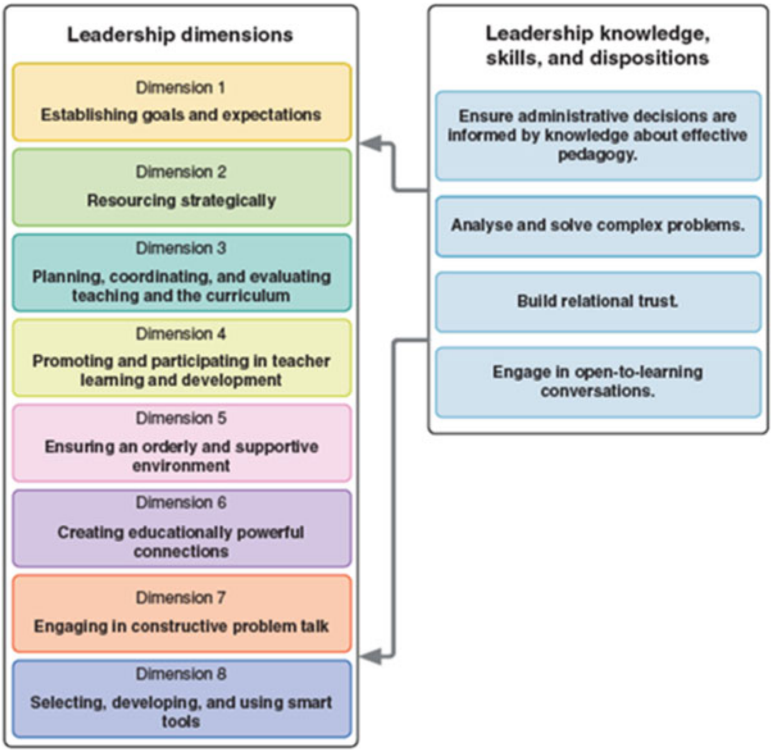
Leadership dimensions
Dimension 1
Establishing goals and expectations
Dimension 2
Resourcing strategically
Dimension 3
Planning, coordinating, and evaluating teaching and the curriculum
Dimension 4
Promoting and participating in teacher learning and development
Dimension 5
Ensuring an orderly and supportive environment
Dimension 6
Creating educationally powerful connections
Dimension 7
Engaging in constructive problem talk
Dimension 8
Selecting, developing, and using smart tools
Leadership knowledge, skills, and dispositions
Ensure administrative decisions are informed by knowledge about effective pedagogy.
Analyse and solve complex problems.
Build relational trust.
Engage in open-to-learning conversations.

Fig. 23.1 Leadership dimensions, knowledge skills and dispositions. From *The dimensions of effective leadership, together with the associated knowledge, skills, and dispositions* by Robinson et al. (2009), *School leadership and student outcomes*: *Identifying what works and why*. *Best evidence synthesis iteration*, p. 49 (Copyright 2009 by Ministry of Education, Wellington)

common purpose (Frost, 2009; Spillane, 2006). Added to this general position on leadership is the compelling research finding that the enhancement of capabilities to link leadership action with improvements in learning can lead to enhanced student achievement (Leithwood, Day, Sammons, Harris, & Hopkins, 2006; MacBeath & Dempster, 2009; Masters, 2009; OECD, 2008; Robinson, Hohepa, & Lloyd, 2009). The work of Robinson et al. on the New Zealand Best Evidence Synthesis on leadership research identifies eight dimensions the work of school leaders should address if they are to influence student learning and achievement more powerfully. Figure 23.1 shows the eight dimensions together with the related knowledge, skills and dispositions leaders need if they are to take helpful action in each dimension.

The accumulating research evidence on working for improvement in Indigenous communities shows that it requires shared leadership with members from those communities able to act as “boundary crossers” between the school, families and the wider community. Leadership partnerships that enhance community capacity in a sustainable way have emerged as critical to long-term improvement in many aspects of Indigenous community life (Bishop, Berryman, Wearmouth, & Peter, 2011; McNaughton & Lai, 2009).

Russell Taylor, former head of the Australian Institute of Aboriginal and Torres Strait Islander Studies, has provided a clear description of the space that needs to be created for leaders from different cultures to work together. Taylor uses the term "intercultural" to describe a space he defines as:

> the 'meeting of two distinct cultures' through processes and interactions which retain the distinctive integrity and difference of both cultures and which may involve a blending of elements of both cultures but never the domination of one over the other. (Cited in Priest, King, Nagala, Nungurrayi Brown, & Nangala, 2008, p. 45)

Taylor's view relies on an understanding that Indigenous peoples are experts in their fields and that any kind of improvement should build on this expertise and strength. A helpful example of leadership within intercultural space comes from the work of Priest et al. (2008) after a comprehensive study of support for learning amongst the Indigenous peoples of the great Australian Western Desert. The substantive outcome from this work is the concept of "leadership both ways" – a practical expression of the collaborative and shared approach to leadership adopted in the design of the PALLIC Project.

Analysis of research findings on the professional learning of leaders has shown that authentic learning takes place over time, supported by mentors or coaches through specific tasks designed to link research with practice in local settings; in short, learning through action on the job, but learning supported by credible others (Dempster, Lovett, & Fluckiger, 2011; Huber, 2011). These dimensions of leadership are clearly aligned to notions of social justice, known in the literature as social justice leadership (Bogotch, 2002).

Our approach to social justice leadership recognises the "parity of participation" principle (Fraser, 2007) applied to economic, cultural and political justice where all participate as peers in social life. It is viewed as the "capability to function" and addresses the question – What are the central capabilities which will provide people with the ability to maximise their well-being unrestricted by discrimination or disadvantage?

When applied to Indigenous education and "Closing the Gap" strategies of which the PALLIC Project is an integral part, this version of social justice leadership includes economic justice (redistribution with a focus on basic services, facilities and infrastructure), political justice (representation by committing to engagement and partnerships with Indigenous Australians) and cultural justice (recognition emphasising the connection of policies to and by building on Indigenous culture) (Gilbert, Keddie, Lingard, Mills, & Renshaw, 2011).

More specifically, the PALLIC Project adopts the "Engoori" Leadership Strategy: It begins by honouring people and identity – who we are and what we value. This perspective provides a "strengths-based platform" to move forward. It counters deficit thinking which often starts with the question: What are the issues or problems here? (Gorringe & Spillman, 2008). A more socially just position starts with the positives and solutions that the so-called deficit group brings to the phenomenon.

This position is grounded in tapping into the strengths of Indigenous peoples to lead learning with their communities.

To sum up, the essence of the leadership research base supporting the PALLIC Project lies in shared leadership in intercultural space in which equal partners articulate common purposes to which each brings particular perspectives from which shared approaches to reading improvement are created.

Section 2: Research Informing PALLIC's Position on Learning to Read

We now move to a discussion of salient contributions from the research into Indigenous children learning to read. There is ample evidence to show that Indigenous children worldwide are at risk of difficulties in learning to read (Lonigan, 2004; Zubrick et al., 2006). Although there have been various attempts to apply different methods of teaching reading to Indigenous children, literacy wars have persisted for over 30 years, fuelled by various assumptions and beliefs about what counts as literacy, for whom and for what purposes. Indigenous children in general continue to fall below national and international benchmarks for literacy achievement. What "counts" in practice is not always evidence based, with undeserved consequences for those most in need. A key concern progressing the literacy wars into the present is the debate about what, and how, children are considered to be at risk of experiencing difficulties in learning to read. National and international studies have confirmed that explicit teaching of key skills (the "what" of literacy) to all children who are learning to read builds a solid foundation (Konza, 2006; Louden et al., 2005; Rowe & National Inquiry into the Teaching of Literacy Australia, 2005). This is especially so for children who live in communities with low English literacy skills and for those who are not progressing at least at average rates for their age level.

In Australia, the *Teaching Reading* Report (Rowe & National Inquiry into the Teaching of Literacy Australia, 2005) provided clear evidence of strategies for enhancing the literacy development of all children. Systematic, explicit phonics instruction is essential to alphabetic code-breaking skills required for foundational reading proficiency, an integrated approach to reading based on strategies to enhance oral language, vocabulary, grammar, reading fluency, comprehension and new technologies and effective support from the child's home. *Teaching Children to Read*, the US report of the National Reading Panel (2000), found that alphabetic/phonemic awareness or letter–sound training does not constitute a complete reading programme. Phonics, especially synthetic phonics/letters to sounds or phonemes and then blending sounds into words, benefits students with learning disabilities and low-achieving students and improves spelling. Guided repeated oral reading by teachers, parents and peers had significant positive impact on word recognition, fluency and comprehension across all grade levels. Vocabulary instruction leads to gains in comprehension if methods are age appropriate. Text comprehension is increased when readers relate ideas in texts to personal experience.

In the United Kingdom, the Independent Review of the Teaching of Early Reading (Rose, 2006) advised on the role that school leaders must take in leading the teaching of reading. It showed that school leaders should ensure that teachers give priority to the teaching of phonics in the teaching of beginner readers; the teaching of phonics is a priority in training and professional development for staff; at least one member of staff is fully able to lead on literacy, especially phonics work; monitoring arrangements are in place to assure the quality and consistency of phonics work; and staff receive constructive feedback about their practice.

In a turn from the what to the "how" in the teaching of reading, Rose (2004) argues for the explicit teaching of literacy skills, but he also points out that the continuation of unequal outcomes for Indigenous students can be traced back to patterns of classroom discourse in institutionalised schooling. This is not to argue that the explicit teaching of literacy skills in traditional classrooms is problematic per se for Indigenous students; rather, his research demonstrates that traditional methods of instruction, using the familiar western discourse pattern of teacher question, student response, followed by teacher evaluation (also known as IRE [Mehan, 1979]) extends the cultural divide between Indigenous students' ways of knowing that they bring to school and how they are expected to learn literacy using non-Indigenous ways in classrooms (Culican, 2005). From Rose's research (2004), the use of IRE patterns in teaching reading privileges experienced white middle-class readers who can recognise, predict and recall patterns with which they have become familiar from an early age. Reporting in his submission to the National Inquiry into the Teaching of Literacy, conducted by the Department of Education, Science and Training, Rose (2005) argued further that "we consider the failure to explicitly teach reading skills associated with each stage of schooling to be the primary mechanism for producing inequality of educational outcomes in the Australian education system" (p. 3).

Taking into account the research directives for the explicit teaching of key skills when teaching reading with Indigenous children, the PALLIC Project has adopted a skills-based approach. Integral to this approach is the explicit teaching of the "Big Six" (Dempster et al., 2012), comprised of five skills identified as phonological awareness, letter-sound knowledge (phonics), fluency, vocabulary and comprehension, overlaid with a sixth element acknowledging the need for oral language development as a vital entry and continuing support when learning to read. A more specific explanation of what comprises the Big Six is outlined in a later section of the chapter along with an explanation of how the professional learning programme for school and Indigenous leaders included evidence-based advice on incorporating "two-way" pedagogic practices in the learning to read programme in schools.

There is increasing evidence that Indigenous families need to be fully engaged with their children as they learn to read. Importantly, this is not to argue that families need to duplicate schools' literacy programmes or to abandon their first languages. Freeman and Bochner (2008) partnered with an Australian Catholic Education Indigenous Unit to conduct a home-book reading programme to bridge the gap between Indigenous children's experiences with books at home and reading instruction at school:

> The children were given books and the family members were shown how to read these books [through games and other literacy related activities] with children. The program also provided an opportunity for effective links to be developed between Indigenous parents and school based Educational assistants. (p. 9)

Key findings from that programme are that although most of the children in the programme still lagged behind national averages for their ages, there were some important improvements in abilities in reading skills. For example, children who in a pretest achieved a mean percentage score on the test of phonemic awareness (24 items) of 73 % increased their scores to 92.5 % on the posttest (Freeman & Bochner, 2008, p. 13). Furthermore, in the posttest interview, parents described a more complex set of strategies for reading with their children at home than they had used beforehand.

In the research that informs PALLIC's learning to read programme, we note that critical literacy (Johnson, 2002) is not foregrounded. This might appear unusual in a project that claims to enact a social justice perspective in leadership for learning. The skills-based approach to literacy seen in the five professional development modules aims first at assisting the principals and ILPs to learn how to assist teachers and families to teach children to read. There is no plan over the longer term to exclude critical literacy in further research and development. At this point in literacy education history in Australia, many Indigenous communities are demanding higher levels of literacy, especially reading, for their children. One of the key concerns is that low levels of functional literacy are precluding many Indigenous children from participating in secondary, higher and further education. We concur with Sena, Schoorman, and Bogotch (2013) that in the longer term, a socially just approach to leading literacy with Indigenous communities should enable the children to read not only the word (skills) but also their world (critical literacy). Such a bifold approach to literacy makes a material difference through greater life opportunities for those who are intergenerationally educationally disadvantaged.

Having established the leadership and reading research base upon which the PALLIC Project has been designed and developed, we now move to a description and discussion of its implementation.

Section 3: Principals as Literacy Leaders with Indigenous Communities (PALLIC)

The Principals as Literacy Leaders with Indigenous Communities (PALLIC) Project is funded by the Commonwealth of Australia, Department of Education, Employment and Workplace Relations, in an initiative called "Closing The Gap" – Expansion

Of Intensive Literacy And Numeracy Programs For Underachieving Indigenous Students. The project is designed to enhance the leadership capabilities of principals and school community leadership teams to work with teachers in partnerships with parents and families to improve reading in Indigenous community schools and schools with significant proportions of Indigenous children. It is being conducted in 45 schools, many of them in remote Indigenous communities in Queensland, South Australia and the Northern Territory. Forty-five school principals, approximately 90 ILPs, that is, 2 per school, 6 LLMs and 4 researchers actively engaged during 2011 and 2012.

The project will enable principals and leadership teams to:

(a) Examine school, system and community data for the purpose of evaluating performance and developing intensive strategies for improvement in literacy learning (reading) and achievement
(b) Build partnerships with Indigenous school community leaders, parents and families to support the literacy learning (reading) of their children

It will also generate evidence to understand the factors that contribute to improved reading in different Indigenous community environments, including parent partnerships, in order to use the findings to inform future project up-scaling in comparable school communities.

The outcomes of action on these objectives will be:

(a) Evidence of improved levels of reading
(b) Evidence of productive partnerships between school, Indigenous leaders and families

The model of delivery uses five professional development modules each of one day's duration involving the principals from each of the participating schools and local Indigenous community partners. Most aspects of the modular learning are provided together while options for some to be undertaken separately are available.

The professional learning in each module leads to follow-up activities in the school and its community. The principals and the ILPs are directly supported by an LLM working with school communities on an approximate ratio of 1–10.

The indicators of the project's success will be evidence of:

1. Improved levels of reading for students in schools involved in the project
2. Productive partnerships developed and enhanced between schools, Indigenous leaders and families
3. Improved capabilities of principals to lead reading improvement across the whole school

Intervention action in reading will be implemented by all schools involved in the project. The interventions will involve principals taking action with their ILPs to develop partnership roles with other Indigenous school community members, parents and families. Specific strategies will be explained, developed and utilised to teach students to read through explicit teaching. Some of these strategies are available from an earlier pilot project, Principals as Literacy Leaders (PALL), conducted during 2009–2010 (Dempster et al., 2012).

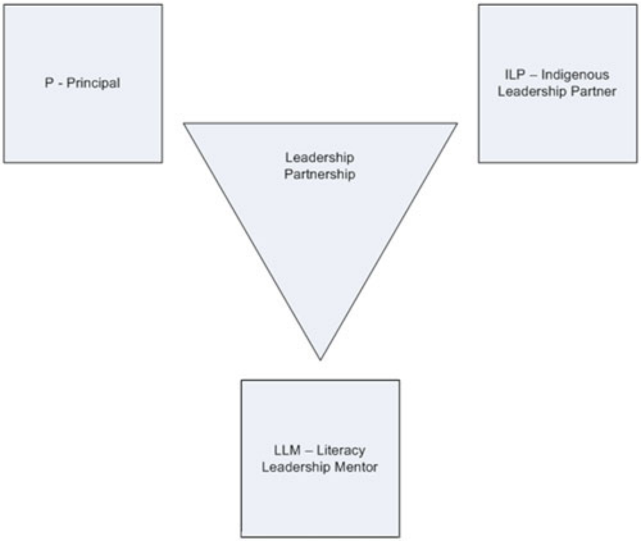
P - Principal
ILP – Indigenous Leadership Partner
Leadership Partnership
LLM – Literacy Leadership Mentor

Fig. 23.2 The relationship between principals, indigenous leadership partners and literacy leadership mentors

The design of the PALLIC Project is explained further through reference to the relationship between the principals, ILPs and LLMs, the trio central to the objectives of the project. This is followed by explanations of the professional learning modules used to stimulate in-school and community tasks leading directly to the planning of improvement action in reading and ultimately the evaluation of the effects of those improvement actions.

Principals, ILPs and Literacy Leadership Mentors

Figure 23.2 illustrates the relationship between school principals, ILPs and Literacy Leadership Mentors. The role of each in the project differs, but together they form a supportive leadership team.

Five Professional Learning Modules

A brief overview of each of the five modules demonstrates a consistent focus on principals and ILPs working collaboratively to lead the teaching of reading with Indigenous students and their communities.

Integral to the collaborative work is the role of the Literacy Leadership Mentors. Mentoring is now understood as an initiative tied to professional development programmes and projects to address social exclusion (Colley, 2003), in Britain, North America and increasingly in Australia. Definitions of mentoring are linked to expectations and assumptions about particular roles and relationships to be enacted between mentor and mentee/s. In the PALLIC Project, six mentors were selected by the three state education jurisdictions participating in the project, based on backgrounds of successful principalship in Australian primary schools. These principals were taken offline (i.e., away from their regular system positions) for the duration of the project. Expertise in literacy teaching was not a requirement. Their brief was to attend the professional development modules and assist the principals and the ILPs to complete expected follow-up activities. The mentors were briefed before each of the meeting days and had a chance to contribute to the drafts of each of the modules. In the periods between Modules 4 and 5, they also came together on a fortnightly basis for teleconferences with other mentors in the project, the project managers and researchers. The purpose of the teleconferences was to maintain the momentum of the project "in the field" and for the group to learn from each other in the lead up to the next module meeting. Their roles approximate that of a "critical friend" or a professional learning catalyst (Swaffield, 2008). An important aspect of this role is to assist ILPs and principals to understand and enact the concept of boundary-crossing in intercultural space to raise critical consciousness and a mutual knowledge base about what it takes to connect Indigenous families and school staff.

Three meetings took place in Cairns, in far north Queensland, as the venue was considered accessible for the 45 principals, their ILPs, the LLMs, the researchers and the project managers. The distances to be travelled were vast but less problematic if Cairns remained the destination for all three meetings. Five modules were delivered over three, 2-day meetings between July 2011 and June 2012. Follow-up activities were undertaken by teams consisting of a principal and ILPs working with an LLM, after each meeting, in preparation for the next module. The follow-up tasks were designed to facilitate reflective practice and empirical data collection in school and community sites and to build knowledge to support the overall aims and projected outcomes of the project.

Following Module 5, the leadership teams complete an evaluation of their improvement action or intervention in reading and report on the effects that action has had, adding to the data set from the project.

Details of each of the professional learning modules follow.

Module 1: Leading Learning: What Does It Take?

This module describes what constitutes effective leadership for learning based on recent meta-analyses of leadership research. It then applies that knowledge to leading learning in Indigenous community contexts by drawing on recent relevant Indigenous research. The purpose of participation was to arm principals and their partner Indigenous community members (who took on roles as ILPs), with necessary knowledge to enable them to take action together in key priority areas known to help in leading learning effectively. The anticipated outcome of discussion and activity with participating principals and ILPs was a commitment to ascertaining how key leadership priority areas can be identified, highlighted, shared and applied with a concentration on reading in their schools and communities.

Module 2: Leading Learning to Read: What Does It Take?

This module describes an evidence-based position on what school principals and ILPs need to know to understand and assist with enhancing children's literacy learning in schools and homes. Key areas of research were discussed to support the overall position that explicit teaching is necessary to enhance phonological awareness, letter-sound knowledge, vocabulary, fluency and comprehension, and that the development of the Big Five is premised on keen attention to early oral language development (the Big Six). The module provided school principals and ILPs with knowledge of key debates about the teaching of reading, so they could more readily gather and analyse data about the literacy practices that were already happening in their school contexts. These data underpinned ongoing "disciplined dialogue" between principals, ILPs, teachers and families about what might be planned, implemented and evaluated to assist in continuing to enhance reading in Indigenous schools and communities. The implications of significant literacy research for remote Indigenous schools and students were emphasised throughout the module.

Following Modules 1 and 2, the leadership teams were required to work on two follow-up activities. The first task required principals and ILPs to develop a local version of the Literacy Practices Guide with teachers for use in the school. The goal was for leaders to work together to gather and analyse data so as to understand more fully what was happening in their schools with regard to the teaching of reading in particular. The second task required principals and ILPs to work together to discuss the relationship between home and school with teachers and parents. The goal was to engage a small group of parents and family members as future "learning catalysts" who could help children learning to read.

Module 3: Leading Data Gathering and Analysis for Literacy Learning: What Does It Take?

This module[1] provided information about the kinds of leadership partnerships, data and evidence that can be used to inform improvements in learning to read with Indigenous communities. It used the *Leadership for Literacy Learning Blueprint* as its point of reference to emphasise *the leadership dimensions* that influence teachers' and children's learning and achievement. Participants encountered a number of diagnostic assessment tools directed at gathering sound evidence *about children's engagement with the Big Six* in learning to read as well as instruments to gather data about the leadership dimensions which contribute to improvements in reading. In addition, the purpose of a distributed model of leadership, as it is foreshadowed in the roles of ILPs and principals, was expanded to embrace the way parents and family members can become connected as *Leaders of Reading* for their children. In doing so, two actions important to the PALLIC Project were to be implemented: (1) the creation by principals and ILPs of a group of *Leaders of Reading* from family and community members and (2) the gathering and use of sound evidence on which to plan future reading improvement inside and outside the school.

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[1] In the production of the modules, the work of the universities which contributed to the original Principals as Literacy Leaders (PALL) Pilot Project is gratefully acknowledged: Griffith University, Edith Cowan University and the Australian Catholic University.

Module 4: Planning Reading Action Projects

The purpose of Module 4 was to examine the actions principals and ILPs together need to take to plan and implement effective Reading Action Projects (RAPs). The hoped-for outcomes of discussion and activity with participating principals and ILPs were:

1. An enhanced capacity to lead and commit to localised school planning based on sound evidence related to three levels of activity conceived as "waves" of improvement action
2. A capacity to use the *Leadership for Learning Blueprint* (as described in Module 1) as a key reference point in applying resources and supporting activity in RAPs
3. A commitment to the implementation of a Home Reading Practices Guide and strategies which engage *Leaders of Reading* from families and the community in RAPs

This module continued the structured conversations with ILPs about features of helpful literacy families, the role of *Leaders of Reading* and how they might be included in supporting children's reading. Underpinning this aspect of the methodology was an evidence base that demonstrates how families might become involved in their children's reading in a variety of ways.

Most families want to help children to learn, but many families are not confident that they have the skills to do so. The research shows that when schools, homes and communities combine resources to help students to learn to read, there is an improvement in student performance. Family input is especially important in Indigenous communities. The PALLIC Project's recognition of this is evident. Moreover, the project endorses the finding that Indigenous leadership is paramount for the success of reading programmes for Indigenous students. Early input by all parents into reading at home is essential to increased school performance. For example, the US Department of Education's Longitudinal Evaluation of School Change and Performance (2001) found that in the poorest schools, grades were 50 % higher for those students who had high levels of early parental outreach.

There are a variety of partnerships between schools, homes and communities based on a belief in shared leadership for learning to read. Goos, Lowrie, and Jolly (2007) describe partnerships as four types: top-down, top-down-supported, school-generated and home–community-generated. The four types of partnership are not discrete, and, therefore, the PALLIC Project encourages partnerships that combine elements from all four as suited to particular contexts. The four types outlined by Goos et al. are described as follows:

1. Top-down partnerships are those initiated and sponsored by an education system with uniform goals and processes across schools. For example, *The Literacy Keys to Learning Framework for Action* 2006–2008 (Johnson, Wyatt-Smith, Colbert, & Klieve, 2011) aimed at upskilling all teachers and some principals on the literacy requirements from Prep to Year 9 in all Queensland state schools.
2. Top-down-supported partnerships rely on an education system for some overall sponsorship or coordination, but schools design and control the programme. For example, Darling (2005) outlines some strategies that families can use at home to extend the classroom teaching of phonemic awareness, phonics, fluency, vocabulary, text comprehension, print concepts and writing.
3. School-generated partnerships are initiated by a school independent of an education system, although they may involve resources available from the system and families. For example, Kennedy (2008) reports on the *Home Instruction for Parents of Pre-School Youngsters* (HIPPY) which is designed to support parents helping their child to read. The distinctive feature of this strategy is that although a Family Literacy Program might be run by community centres, libraries or school boards, a trained parent assistant from the same community visits home and works with parents to enable them to participate in parent–child literacy activities. Each parent assistant works with 10–15 families. A programme has a coordinator who oversees the work for every 12 parent assistants. Literacy resources focus on language and reading with children. Although HIPPY is for any parent who wants educational enrichment for his/her child, the model was designed to remove barriers to participation, due to lack of education, poverty, social isolation and other issues.
4. Home–community-generated partnerships are those that are driven outside schools, by families and communities.

There is evidence that programmes that are community driven to a greater or lesser extent have worked well internationally. The following examples from the research demonstrate some ideas that were discussed during Module 4 with a view to principals and ILPs designing RAPS for implementation in their schools and communities.

It is well known that early input into children's literacy is primarily by mothers. Showcasing an alternative approach, Ortiz's (2001) study in the United States focuses on fathers' contributions using environmental print and recreational materials with their young children, for example, road signs, maps, magazines, comic strips in newspapers, instructions for board (electronic) games, religious materials, homework instructions and crossword puzzles. Indigenous families can be helpful as their children learn to read in at least three ways. First, it is important that they recognise that families and carers are the most important influence on children's learning (Timmons, Walton, O'Keefe, & Wagner, 2008; Willms, 2003). Even absent fathers should be encouraged to contribute to children's reading activities at home via technology. The StoryBookDads (and more recently Mums) Project (Storybook Dads, n.d.) was first run as a registered charity in Her Majesty's Prison Dartmoor, in the United Kingdom. Accordingly, parents make CDs of their reading bedtime stories to send to their children at home. The initiative encourages some of the prisoners to be formally trained as editors to edit out mistakes in reading and add sound effects to enhance the quality of the finished story. Those prisoners complete an Open College Network qualification at level 2 in sound and audio production. The project is now running in Acacia Prison, Western Australia's only privately run prison. At-home fathers' literacy activities with children are not always about reading a story or homework tasks. The functional, household and environmental print needs of children matter also, for example, signs and labels (Ortiz). Older generations and extended family members are also important in teaching children to read.

In the Western Desert Lands in Australia – Warrki Jarrinjaku – in an Aboriginal Child Rearing Strategy, the older women lead such an initiative by telling and recording stories of child-rearing practices "so the little kids can learn all the rules, like ceremony and marriage". The recording is done in a combination of the women's written language and English to describe their vision, and a way forward, to improve the health of their families and children's well-being (Priest et al., 2008).

A second means of families helping children learn to read in the community includes families' informing schools how to support Indigenous students learning to read English in conventional school classrooms. The families teach non-Indigenous principals and teachers essential Indigenous knowledge to stop their making erroneous cultural assumptions about students' classroom behaviours as they learn to read. The Indigenous Literacy Foundation in Australia aims at raising literacy levels and improving the lives and opportunities of Indigenous Australians living in remote and isolated regions. This is done by providing books and literacy resources to Indigenous communities and by raising broad community awareness of Indigenous literacy issues, for example, *The Naked Boy and the Crocodile* stories by children from remote Indigenous Communities (Griffiths, 2011).

Module 5: Evaluating the Effects of Reading Action Projects

The final module was delivered over a 2-day final meeting. The primary purpose of Day 1 was to enable principals and ILPs to learn from each other about the actions taking place in their schools, classrooms and communities to improve children's reading. A second purpose was to explain the research tasks which follow the completion of Module 5 and to introduce the research team to principals and ILPs from whom approval for school and community visits was sought. The purpose of

Day 2 was to enable principals and ILPs to lead the evaluation of the effects of the RAPs being implemented in their schools, classrooms and communities. Participants were exposed to practical tools to assist in leading the evaluation, determining its purposes, the way information and evidence about impact and effects are to be gathered and who would be involved interculturally in the discussion of the information gained. Ultimately, the outcomes of the evaluation process feed forward into new strategies and to the continuation of strategies known to work to improve reading. How the leadership partnership between principals, ILPs and community Leaders of Reading contributed to improvement is an essential element of this overall process.

Evaluating the Impact of PALLIC

It is too early at this point to tell the overall impact the PALLIC Project has had on the schools, families, communities and students involved, as the research agenda we referred to earlier is yet to be completed. That agenda is shared with the principals, ILPs and the academic team. Collaboratively, the three will document the impact that the PALLIC strategy has had in building equitable family–school partnerships, especially its focus on progressing reading in the 45 Indigenous communities across Australia in which we are working.

In this chapter, our particular interest is in understanding the perspectives and actions that ILPs bring to their roles in the project. Of similar importance is the consideration of how partnerships between the principals, the ILPs and Indigenous families are emerging. As designers of the research, our approach to gaining such insights is motivated by the view that it is through storytelling and conversations that human beings make sense of who we are (Andrews, 2007). It approximates voiced research described by Smyth and Hattam (2001) as an appropriate means of addressing differently what up until now might have appeared as intractable educational problems in disadvantaged sites. It affords those most impacted by a problem, the chance to tell their stories from a critically reflexive perspective with a view to reshaping their futures.

Throughout the project, the ILPs have taken up opportunities at the module meetings to have informal conversations with the research team, their colleagues and the principals about their aspirations, expectations and progress in their roles. A summary of key themes from the first meeting illustrates their thoughtfulness about the role, a perspective that does not deny the precarious nature of the tasks at hand as they work at the interface between school and families.

Written records of the conversations demonstrate the ILPs' understandings of Indigenous families' dreams for their local school to offer the best possible educational outcomes for their children, including:

- More cultural sensitivity on the part of teachers
- More cultural activities and content embedded in curriculum

- School-based work placements
- Leadership roles for Indigenous students and families
- Aspirations for Indigenous children to believe and dream of a better future
- Equal rights and opportunities but not such that they are "spirit killers"

Particularly pertinent questions asked by the ILPs during conversations about the roles of principals and teachers included:

Why do teachers and principals have low expectations of Indigenous students in remote schools?
What do the data say about our school and our level of literacy for Indigenous students?
Why aren't our kids achieving to the same degree as non-Indigenous kids, knowing that often their attendance is consistently above 90 %?
What are the beliefs about Indigenous learning that teachers have – and how might we influence those beliefs?
How can we support parents to do more than they currently do?
What do teachers come to know about the language backgrounds of the students in their classrooms?
Why don't our families want to come to school to engage in our kids' learning? Why don't they feel comfortable?
How can we show teachers how our children learn best?

Discussion with the ILPs showed the extent to which they recognised particular strengths necessary to pursue their roles effectively. Some recurring themes were patience, perseverance, encouragement, respect and recognition, communication skills, commitment, values and beliefs, local knowledge of country and a realistic timeframe. They also expressed the need for support from school and parents and an engaged community and support from members from other agencies, Elders and Dreamtime Stories, if they were to carry out their roles effectively.

Finally, the ILPs expressed a vision at the beginning of the project that their work would be successful if, after a realistic period of time, they saw at least some of the following activities happening in their schools and communities:

- Cultural programmes happening across the school
- Both-ways communication
- Parents and families participating in their children's learning
- Principals and teachers being active in the community
- Good results and attendance for students
- Leadership roles being undertaken by students
- Equal opportunities for all children at the school
- Children wanting to come to school
- A happy community
- Awards given to act as role modelling
- Sporting and cultural events as part of school community activities

The summaries of these initial conversations between the ILPs and members of the PALLIC Project research team demonstrate the high level of commitment that the ILPs had to the project from its early stages. Integral to the inclusion of conversation time with the ILPs is the notion of voiced research. Critical consideration of voice is a significant aspect in our project as it challenges assumptions that disadvantaged families' and communities' roles in schools are primarily to be silent or managed. The first module opens the way for ILPs to engage proactively with those in positions of power in schools from the start (Smyth, 2009). The methodological design questions the basis on which disadvantaged parents are under-represented in school involvement internationally (MacBeath et al., 2007). It defines an appropriate position from which to challenge deficit research designs that purport to alleviate disadvantage. In contrast, this methodology supports a section of the school community which might have remained silent, reactive or managed by schools in the past. Finally, it "speaks back" to a discourse of blaming such community members for their lack of involvement and engagement in the schooling enterprise (Mills & Gale, 2004). In the main, these conversations empowered the ILPs to begin to believe in the project's aspiration for an equitable partnership within schools and between schools and their communities.

Evidence of how the collaboration between the ILPs, the principals and families is emerging is best judged by the RAPs that are currently being implemented in each of 45 home–school sites, across three Australian states and territories. Four schools responded to the call to publicly present the work they are doing in teaching the Big Six skills approach to reading and to show how this focus on reading in the school has impacted parents working at home. It appears from the teleconference conversations held with the LLMs that the greater action in schools has focussed on teaching and learning the Big Six. There is, however, evidence of change in parent, family and community interactions around education more generally. In one school, the ILP has engaged several other "leaders" who support the educational efforts at school from outside. For example, in that school, an Indigenous park ranger engages the children in environmental literacy by visiting important Aboriginal sites and discussing flora and fauna in English and the local Indigenous language.

Section 4: How the Home–School Partnerships Are Emerging: Good News Stories

We now provide a snapshot of emerging progress made in the PALLIC partnerships by recalling some of the good news stories that are beginning to point towards building capacity for children's reading through an innovative approach to family–school connections with Indigenous communities in Australia. The good news stories are extracted from schools' reports to the project managers. They relate to the changes that have occurred in the participating schools in regard to the teaching of reading and/or increased community involvement that has occurred as a result of the PALLIC Project professional development programme. The following stories feature schools that involve the principal, ILPs and the Big Six approach to teaching reading, since they have become involved in the project. The stories show the crucial role that ILPs are playing in linking homes and schools in the teaching of reading. For privacy purposes and in compliance with ethical approval for the research, the schools are not identified.

Example 1. It was not until the second Cairns meetings (for Modules 2 and 3) that the focus on reading started to have some traction. At these workshops, the principal brought along two ILPs. The second person to come was an experienced community representative with a knowledge of how schools operate. This addition to the team strengthened the resolve of the community to focus on reading. This was the first breakthrough for the school. The principal was able to appoint a new assistant principal for support and as a team with the ILPs to address the "intervention problems that have dominated" and to focus on a whole-school approach to reading.

Example 2. PALLIC has become one of the key factors in extending community involvement in the school. The ILP has developed a "We B- Look U" Bar-B-Q approach. This started small with three parents and has now increased to an average of 23 parents meeting regularly as part of the Bar-B-Q approach. The method is to use a "yarning circle" to hear what parents want to see in the school and to engage them in supporting the approach to reading.

Example 3. PALLIC was the catalyst to involve Indigenous members of the community as Literacy Leaders. At the first sessions, which involved Modules 1 and 2, the person who was invited to attend as the ILP was already an employee at the school. The second sessions involved another ILP who was a parent. The impetus from these sessions enabled the ILPs to come back and establish a Parent Reference Group. A small group of five parents with an extra community member formed the nucleus for this group. The focus has been on "What can we do better?" with Aboriginal and Torres Strait Islander families to engage them in the school and with their children's learning. One initiative was the establishment of a "Rainbow Room" where parents can drop in and meet regularly. PALLIC was the centre-piece to start making community connections. The links are being made because of the raised profile of ILPs in the school.

Example 4. Half way through term 3, every teacher had been involved in professional development on the teaching of reading focusing on each year level. This was followed up with a moderation activity on reviewing student work carried out during a student-free day in October this year. By the middle of October, each teacher had engaged in a disciplined dialogue with their line manager on the collection and use of data in reading. These aims have been to develop consistency in methodology, a balanced reading programme based on the Big Six and the teaching of reading across subject disciplines. Shared understanding and the development of teacher confidence have been the major priorities. The reading programme was supported by the establishment of a Parent Reference Group – called "Yubu-Yunga". This was developed with the ILP and the principal. The emphasis has been on building strong networks. One of the focus areas has been on early reading experiences and the development of a Home Reading Practices Guide.

These vignettes display the bridging work that is necessary before Indigenous communities and schools can work together to enhance children's learning. The ILPs who feature in these examples are a vital link in the partnership between schools and families. The success of the ILPs in initiating two Parent Reference Groups shows a level of participatory action that is not often seen in the research literature. More familiarly, partnerships between homes and schools are driven by the schools' agenda, leaving those parents whose assumptions and values do not match those of the schools, to falter. There is an alternative possibility here in that the members of the reference groups will likely become future leaders of reading in their communities as they find appropriate ways to work with the ILPs and the staff in their schools. What we see is some movement from the good intentions of the project brief towards socially just differences in the way home–school collaborations are forming. The more important tests of the impact of the project will become visible in assessing material differences in the lives of Indigenous children through learning to read in standard Australian English.

Concluding Comments

The methodology we have described as underpinning the PALLIC Project is supported by theory and practices of social justice expressed through leadership for learning which moves from a deficit view of Indigenous family and community capacity to equitable engagement in children's learning to read. Central to the enactment of the methodology is an understanding that tripartite collaboration between principals, ILPs and Leaders of Reading from the community, assisted by LLMs, has the capacity to increase Indigenous children's ability to learn to read. We have aligned our investment in this approach to the Engoori Leadership Strategy used in the work being carried out in Dr Chris Sarra's Smarter Stronger Institute that provides a "strengths-based platform" to move forward (Gorringe & Spillman, 2008).

Sustainability is a constant concern for large-scale learning initiatives such as the PALLIC Project. Providers rightfully ask how to build and ensure sustainability during and beyond the life of the initiative. For accountability purposes, measures for sustainability are aimed at ensuring measurable and continuing change for the financial and human effort expended. The sustainability factor for the PALLIC Project lies in the parts played by the ILPs in leading families and communities to connect with schools in an equitable partnership to help children learn to read. The initial evidence we have discussed shows promise that progress made so far may be sustained over time.

We began with the premise that all children risk educational disadvantage when families are disengaged in their learning to read. Indigenous families currently are least well positioned to assist their children in English literacy, and this impacts negativity on their children's chances of benefiting from educational opportunities.

Unless the gap in school performance between disadvantaged children and those who are more affluent is addressed, the consequences for Australia and other nations where disadvantage is a growing concern will remain as a “blot” on the social landscape. This research and development rests confidently on the premise that strong family–school partnerships ensure better opportunities for children’s learning. This provides a firmer basis than is currently available to examine a causal connection between parent involvement and student achievement. The findings will greatly assist disadvantaged schools with a cost-effective, equitable means of implementing policies such as the *Family–School Partnerships Framework* (DEEWR, 2008) to enhance student learning. This project is a viable attempt to have disadvantaged students better served by their education systems. The flow-on effects for disadvantaged children who graduate from school are seen in greater chances of employment and well-being (Bishop & Berryman, 2006). This is a stated long-term aspiration for those ILPs involved in the PALLIC Project.

The PALLIC Project has been designed mindful of prior research that sought to improve the lives of Indigenous populations around the world, through a focus on education, and often more particularly, literacy/learning to read. So far, we have learnt that collaborations between Indigenous homes and schools benefit from a designated “go-between”/Indigenous Leadership Partner who understands “both ways” of learning and living and from the eagerness of the go-between to enlist others from the Indigenous community to input into the collaboration – to lead, not just listen. Finally, such a venture benefits from a common understanding that material and social change will come with persistence over the longer term. The underlying aim of the PALLIC Project is to challenge dominant discourses held about the place of education in Indigenous communities. The challenge to a dominant “deficit” discourse of Indigenous-led education is threefold: Indigenous communities’ engagement in educating their children to read in Standard Australian English facilitates economic, political and cultural justice.

The methodology we have described as underpinning the PALLIC Project is supported by theory and practices of social justice expressed through leadership for learning which moves from a deficit view of Indigenous family and community capacity to equitable engagement in children’s learning to read.

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Chapter 24

Socially Just, Inclusive School Environments in the United States: Creating Spaces for Dialogue

Courtney L. Orzel

Introduction

As educators we have failed to create schools that are just, excellent, inclusive, and deeply democratic. ~ Shields and Edwards (2005)

> *Ahmad: Mrs. Orzel, what do you do when people are racist?*
> *Mrs. Orzel: Why? Has someone been racist to you?*
> *Ahmad: You know I'm Arabic, right?*
> *Mrs. Orzel: Yes. Why?*
> *Ahmad: People are calling me terrorist and suicide bomber.*
> *Mrs. Orzel: Who?*
> *Ahmad: I can't say who. It happens all of the time—all day, every day.*

Historically and recently, education is a debated topic. In fact, many argue that education is in crisis (Barber, 2001; Bode, 2001; Giroux, 2002) and reform is needed. Such crises have driven educational reform efforts around the world for decades. In the United States, reform efforts, like the No Child Left Behind Act of 2001 (NCLB), are at the forefront of discussion and debate. NCLB, the most recent of reform efforts in The United States, is a reauthorization of the Elementary and Secondary Education Act of 1965 (ESEA). Driven by direct accountability for individual student learning, NCLB claims to advocate for all students, yet the achievement gap still exists. As a result, many students, like Ahmad, are excluded from programs and curricula because their backgrounds, including their home language, religion, or ethnicity, are dissimilar from those of the predominantly White middle-class children still seen as today's typical students.

In the United States, federal mandates narrowly frame accountability through standardized testing processes and perpetuate hierarchical, inequitable learning processes

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while limiting educational opportunities, narrowing the curriculum, marginalizing students' access to diverse experiences and curricula, and ultimately silencing necessary dialogue in schools. Inequities created by such reform efforts exacerbate educational disparities and leave school leaders, especially principals, facing monumental challenges when trying to create an inclusive school. Dr. Carolyn Shields, a leading researcher in the area of social justice, and the Dean of the College of Education at Wayne State University in Detroit, Michigan, states, "…inequities are unacceptable in deep conceptions of democratic schooling…educational leaders need to find ways to overcome disparity and to provide more equitable learning environments for all students" (Shields, 2009, p. 25). Thus, the educational disparity is evident and drives current school reform efforts, which claim to create inclusive school communities, yet ultimately create failing schools and eliminate critical dialogue.

Until recently, minimal attention has been focused toward inclusive leadership practices which address the unintended exclusion of some students. Recent literature indicates, and federal mandates substantiate, that issues of school reform cannot be separated from inclusive practices focused on dialogue, equity, and democratic principles. According to Shields (2009):

> We need to recognize the forces that prevent social institutions from creating inclusive communities in which all educators and students can safely bring the totality and complexity of their identities as a basis for their learning. We must create learning environments in which all children can build on their personal experiences, the values of their cultures, and the languages they speak at home, in order to make sense of what they are learning. (p. 32)

This chapter will explore how educational leaders can use dialogic practices to create socially just school environments. For the purposes of this chapter, while I will bring in the school community, I am delimiting my definition of social justice to the school and its practices. First, I will explore the challenges associated with school reform efforts and socially just environments. Next, I will provide an overview of definitions and the scholarship in the areas of social justice and dialogic practices of educational leadership. Next, using my doctoral work as a backdrop, I will explore the challenges educational leaders face when trying to create a socially just environment. Finally, I will provide practical examples for school leaders, specifically, school principals, to use dialogic practices in order to create socially just, inclusive school environments.

School Reform Challenges

Mrs. Orzel: Ahmad, how does it make you feel when students call you terrorist and suicide bomber?
Ahmad: I feel horrible. I just feel like I don't belong here.

Recent accountability and standards-driven movements draw attention to inequities in educational opportunities for various groups of students and place the burden on educational leaders, specifically school principals, and policy makers. Similarly, teachers face challenges to meet all students' needs while meeting stringent achievement expectations. Due to these reform efforts, teachers are deskilled, and students lose opportunities in the classroom to participate in engaging dialogue and rich curriculum.

Although school reform efforts in the United States claim to advocate for more inclusive and equitable outcomes, routine, technical, managerial, and scientific approaches in education are still prevalent and often utilized in school systems. And while schools continue to become more diverse each year, school leaders and school structures remain stagnant in many cases. Not only do principals face challenges meeting the federal and state demands placed upon them, they also have diversity in all aspects of their school buildings. Diversity is present in ethnicity, culture, socioeconomic status, gender differences, ability, and class; principals must lead inclusive schools which encompass all aspects of their diverse, multifaceted communities.

Creating socially just, democratic school environments is not an easy task for school principals. Shields (2009) argues that schools need to be both socially just and deeply democratic—there cannot be one without the other. Yet, educational leaders, specifically principals, are bombarded and pressured by state and federal mandates. While federal reform efforts are designed to measure accountability, academic gains and progress are measured by a single, standardized test, leaving school leaders to face a daunting and overwhelming challenge to meet these federal and state mandates while providing a democratic, socially just, inclusive learning environment. As an example, schools are expected to meet Adequately Yearly Progress (AYP) targets under NCLB guidelines, and 100 % of students are expected to be "proficient" by the year 2014. By mandating a 100 % proficiency rate, states actually lower their standards and dumb down the curriculum. Diane Ravitch, a Research Professor of Education at New York University, speaks to this challenge and adds that such targets have "stigmatized schools that could not meet this unrealistic expectation." To that end, the most recent national tests show that no improvement has been made in 8th grade reading since 1998. Needless to say, with the hope of No Child Left Behind dwindling, reform efforts in the United States have been heavily debated in the past few years.

Consequently, under this model, many schools end up labeled as "failing schools" even though they have made academic progress. To that end, principals face a great deal of responsibility for ensuring that students are learning and making Adequate Yearly Progress; therefore, school leaders tend to take control over situations and perpetuate the routines and hierarchy in schools which ultimately diminishes their participation in and creation of socially just, democratic, inclusive practices like dialogue and collaborative, shared decision-making processes (Ryan, 2006a). Ravitch (2010) explains why the term "failing schools" should be eliminated. She states:

> We should stop using the term "failing schools" to describe schools where test scores are low…Among its students may be many who do not speak or read English, who live in poverty, who miss school frequently because they must baby-sit while their parents look for work, or who have disabilities that interfere with their learning. These are not excuses for their low scores but facts about their lives. (p. 1)

Here, Ravitch stresses the importance of diversity in schools by highlighting the point that students come from various backgrounds and bring different perspectives to school. Thus, in order to create a socially just environment, educators must understand the disparities in educational achievement related to students' abilities, home lives, and personal experiences.

Many scholars argue that educational disparities are prevalent in today's educational system. Social, cultural, economic, and political disparities are evidenced in the nation's achievement data. Shields (2009) speaks to such disparities and suggests:

> …there are systemic barriers in terms of both structures and attitudes- fiscal resource allocation, school facilities, teacher training- as well as discrimination that prevent all students from achieving at similar levels or from having similar opportunities for life choices and chances beyond school. These disparities can no longer be ignored. (p. 20)

School leaders must understand such disparities in order to address individual students' needs.

Defining Social Justice

For the purposes of this chapter, it is important to understand the term "social justice" and its relevance to school leadership. In order to create communities in schools where every single teacher, student, parent, and community member feels safe, secure, respected, and valued, school leaders must understand social justice.

Social justice requires that everyone in the learning community (students, parents, teachers, community) have access, opportunities, and a voice in the learning and decision-making processes within a school. Socially just environments require that members of the community examine inequitable practices that eliminate power imbalances of minoritized students and parents and allow everyone in the community to feel welcome. Socially just schools expect and hold high expectations for students while purposefully creating opportunities for diverse perspectives within an inclusive environment. Thus, one must understand how the notions of inclusive community, power, exclusionary practices, and dialogue play a critical role into a bigger picture of socially just school environments.

Defining Inclusive School Community

One way some scholars advocate to address challenges associated with limited dialogue in schools is through the implementation of an "inclusive school community." An inclusive school community is one in which "people come together, acknowledging the intrinsic worth of each member of the community, in playful, creative, and empowering interactions" (Shields & Edwards, 2005, p. 7). Using dialogue as the foundation of community, an inclusive school community is one which is deeply democratic, equitable, and one that treats individuals with "absolute regard" (Starratt, 1991). Therefore, through a social justice lens, inclusive communities promote dialogue and equitable opportunities for all students, especially those who have been traditionally underserved and marginalized.

Inclusive Leadership

Many argue that education is in crisis (Barber, 2001; Bode, 2001; Giroux, 2002; Lipman, 1998; Peck, 1993) and reform is needed. Exclusionary practices are deeply rooted in today's educational system, as racism, classism, and sexism continue to plague American students' school experiences. Despite No Child Left Behind's surface attempt to engage marginalized students, routinized school system approaches to standardized testing procedures perpetuate these patterns of exclusionary practices. Students who need engaging, rich, and diverse curriculum are often the same students who receive the "drill-and-kill" rote curriculum. This next section will discuss the importance of inclusive leadership in schools and how that leadership connects to the larger context of building community.

Power

Within school systems, power and hierarchical school structures present barriers to inclusive schools. Those in power, usually school leaders, control who has a voice in the school's decision-making processes, leaving minority and low-income parents and students to feel silenced in the school setting. As a result of such power hierarchies, parents and students who struggle with school the most are often the group who is left out of such decision-making processes. For example, parents and students who speak another language or parents who work more than one job find it difficult to engage in the school. Thus, school leaders face significant challenges to find opportunities for these marginalized groups to engage in decision-making processes. However, James Ryan, a leading researcher in the area of inclusive leadership and professor in the Department of Theory and Policy Studies at the Ontario Institute for Studies in Education at the University of Toronto, reminds us that critics of inclusive practices argue that such shared decision-making practices and collaborative processes "will waste people's time, delay important decisions, raise operating costs, and increase workloads. But if hierarchies remain, efforts at inclusion will also be fake…" (Ryan, 2006a, p. 13).

Exclusionary Practices in Schools and Leadership Challenges

> *Mrs. Orzel: Teachers, are you aware that our Arabic students are being called terrorists and suicide bombers?*
> *Teacher: No, I am not. I have never heard that before, and I have worked here for years. Is it everyone or is it just one kid?*

> *Mrs. Orzel: Does it matter if it is just one student? Isn't one student who has to face that type of racist comment enough to address it as a school?*
> *Teacher: I don't have time to talk about this in class. We have so much to cover in class that there isn't time for things like this.*
> *Mrs. Orzel: If we have students who are being called "terrorists" and "suicide bombers," then they most likely aren't focusing on your content as it is. Why don't you try to open the dialogue and see what happens?*

Exclusionary practices in education marginalize and impact all students, but especially those from minoritized backgrounds. School programs and curriculum exclude and marginalize students because of external, uncontrollable factors such as gender, ethnicity, and poverty. Students from disadvantaged backgrounds are repeatedly excluded, denied educational opportunities, and silenced in the school setting (Ryan, 2006b; Shields, 2009).

School leaders face significant challenges to address academic, social, and emotional needs of all students. In many cases, school leaders perpetuate exclusive practices by falling victim to federal mandates and ultimately limiting dialogue in schools. In turn, crucial dialogue does not occur unless spaces for dialogue exist. Hence, school leaders face an overwhelming, yet necessary, challenge to create inclusive communities which promote—and expect—spaces for necessary dialogue to occur.

Notions of equity and access present another challenge to creating inclusive schools. In many schools, curricula and programs suffer as a result of federal mandates. For example, art, music, and foreign language programs are often eliminated and replaced with more math and reading programs to meet Adequate Yearly Progress requirements. Consequently, teachers are deskilled, and the curriculum becomes a drill-and-kill model of reading and mathematics, essentially marginalizing disadvantaged students (Ravitch 2010).

Students are also excluded from the learning process in a subtle manner. As an example, Bourdieu's (1991) notion of "cultural capital" or "valued resources" (Ryan, 2006a) plays a role in exclusionary practices in schools. Students who can conform to the normed values of the organization are often rewarded for exhibiting those behaviors in school; those who cannot conform are often excluded. Often, school excludes students because students do not know the norms and culture of the school itself. Therefore, social class hierarchy and privileges afforded to middle-class students impact students' experiences in school (Bourdieu, 1991; Hallinger & Heck, 1998; Ryan, 2006a, 2006b). In other words, students from middle-class backgrounds who possess certain kinds of "cultural capital" and can act, think, and talk in certain ways have an advantage of those students who cannot. As Ryan states, "…schools exclude some students from activities by requiring them to have attributes or resources associated with cultural capital that they do not possess" (p. 25).

Lack of Dialogue

> …the entire social arrangement called "school" should be designed around this purpose of introducing children to the life of dialogue (Sidorkin, 1999, p. 4).

> *Teacher: Mrs. Orzel, you won't believe this. I had the conversation with my students this morning. Every single student said that they had heard students in our building called terrorists and suicide bombers.*
> *Mrs. Orzel: Really? So what did you do?*
> *Teacher: We spent the entire period discussing it. Did you know that many of our Arabic students are being called this? Did you know that our Arabic students don't want to come to school because of these comments?*
> *Mrs. Orzel: I can imagine. It's horrible. So what did your class say about it?*
> *Teacher: We are going to make time weekly to discuss it, but we all agreed that as a school we need to talk about it. Do you think we could make it part of our Advisory lessons next week since it appears to be impacting the school? So many of my students said they feel awful about it but don't know how to address it. I think we need to help them.*
> *Mrs. Orzel: Sounds great. Why don't you put something together for the staff and we can continue the discussion next week in Advisory?*
> *Teacher: Great, but I really want the students to help me. Is that ok?*
> *Mrs. Orzel: I think it's a great idea. Thanks for your leadership.*

Dialogue is severely lacking in today's schools and classrooms. Consequently, at the forefront of educational policies and reform efforts are centralized curriculum and testing processes which minimize classroom conversations. Teachers and administrators must ask themselves: "How much time is the teacher talking in class versus allowing opportunities for students to dialogue and make meaning through dialogue?"

A strong need for dialogue exists in today's school systems. Yet, as a result of mandates, many schools eliminate critical conversations in the classroom. Sidorkin (1999) suggests that "it is the lack of language for describing what works in schools that…prevents educators from turning every school into a good place to spend one's childhood" (p. 2). Similarly, Shields (2009) supports the notion of dialogue and connects the idea to educational leadership when she states, "As educational leaders, we must be present through initiating and facilitating the dialogue that permits all voices to be heard" (p. 111). Thus, a strong need for dialogue is evident, and school leaders need to provide spaces for critical conversations to occur.

Challenges Facing School Leaders

Schools as institutions are isolated, tightly controlled organizations which leave little room for dialogue and diversity. To support that notion, Shields (2009) states, "When we think of schools as institutions, we tend not only to deskill teachers, but also to destroy their sense of agency and personal control. In turn…students are also deskilled and dehumanized" (p. 131). In order to provide collaborative relationships instead of traditional hierarchies, leaders must provide equitable, caring, and fluid relationships to foster dialogue. Ryan (2006a) suggests:

> The task for leadership…is to raise the consciousness of people so that they can recognize widespread and harmful exclusive practices like racism and sexism and do something about them. This requires that school communities perpetually raise questions about what they do and about the wider context within which learning and schooling occurs. (p. 58)

Principals face significant challenges in creating inclusive schools. In order to promote inclusive leadership in schools, principals must not only promote academic achievement but also prepare students for a pluralistic, democratic society. Astin and Astin (2000) support that notion and state, "…the value ends of leadership should be to enhance equity, social justice, and the quality of life" (p. 6). Several other scholars would also support the idea that leadership should value equity and social justice, yet these notions are rarely considered the purpose of school leaders in today's educational field. For example, Moller (2009) discusses a shift in process to a shift in outcomes and accountability. He states, "However, by this shift in focus there is a risk of ignoring some of the most critical purposes of public schooling, for example preparation for participation in a democratic society or processes that creates and sustains social justice…" (p. 40). Similarly, Shields (2009) suggests that those in formal positions of leadership "must choose to exercise their power in moral ways to intervene in the processes and content of schooling to create learning environments that include all children" (p. 152). Similarly, Frattura and Capper (2010) call for "revolutionary strategies" in rethinking leadership practices to address diverse needs of students (p. 4). As a result, in order for school leaders to become inclusive leaders, they must incorporate these "revolutionary strategies" and include both the academic excellence component of education and be socially just leaders. Rarely do school leader job descriptions discuss or define "socially just" expectations. However, if a principal is to create an inclusive school community, leadership must involve aspects of social justice.

Challenges to creating and leading a socially just, inclusive school are evident. Diverse school populations coupled with inequitable access to school programs, opportunities, and curricula create barriers to socially just environments; however, while increasing diversity is a prevalent topic for school leaders, it is ultimately the educational system's policies and structures that create the inequities in the school (Frattura & Capper, 2010). Thus, inclusive leaders must face the challenge to move beyond the discussion of challenges in education and become activists for caring communities where relationships are central. Dantley and Tillman (2010) suggest that creating socially just schools starts with educational leaders. They state, "We must move from passive discourse and involvement to conscious, deliberate, and proactive practice in educational leadership that will produce socially just outcomes for all children" (p. 31). Therefore, scholars argue that socially just and deeply democratic outcomes are vital for inclusive leadership approaches.

Inclusive Leadership Approaches

Leadership styles and approaches are varied, and not all approaches promote inclusive leadership. Some forms of leadership can be viewed as one-sided and may actually promote power imbalances in school settings. Ryan (2003) suggests that inclusive leadership practices show more promise and are more communal versus exclusive. He states, "…inclusive forms of practice and attention to global forms of power and justice, critique, action and dialogue will help, rather than hinder opportunities and life chances of traditionally marginalized groups" (p. 59). Therefore, inclusive school leaders play a critical role and must pay attention to opportunities and power to provide access to marginalized students.

The role of the principal in creating an inclusive school is vital. To support that point, Ryan (2003) suggests, "Principals are in ideal positions to promote inclusion… Moreso than perhaps any other individual, they have the power to shape leadership practices that are consistent with inclusion" (p. 171). In the same sense, Shields asserts that "the task of the leader is to have a clear vision, to express it articulately and symbolically in ways that attract others, and then to help people work together to create an inclusive and deeply democratic school" (p. 146). As a result, through inclusive principal leadership practices, the literature suggests the key to creating inclusive communities is to provide access for all students. Capper (1993) supports that notion and claims, "…administrators…have a responsibility not only to provide an education that is inclusive of, and meaningful to, all students in the district…but to be sure students have access to information about identities and cultures representative of the diversity of society" (p. 292). Thus, principals possess a great deal of influence to provide access and opportunities for all students.

Finally, the role of the educational leader must be to create inclusive communities which promote deep democracy. Moller (2004) suggests that the role of the principal is to the democratic citizen. Similarly, Green's (1999) notion of deep democracy enables leaders to think deeply and critically about creating democratic citizens. Green suggests that "a limited, formal conception of democracy contrasts with a *deeper conception of democracy* that expresses the experienced-based possibility of more equal, respectful, and mutually beneficial ways of community life" (p. vi) and "sustainable transformation requires the development of a deeper democracy" (p. 202). To that end, Shields (2009) asserts that education must be both deeply democratic and socially just. She encourages educational leaders to "prepare students to live in a democracy by teaching the skills and dispositions to live in mutually beneficial relations with others…it requires educators to give students opportunities to *practice* democracy" (p. 6). As a result, leaders must keep deep democracy as a central focus to overcome the dichotomy between academic excellence expectations and conceptions of social justice, equity, and access.

Equity and Access

Inclusive leadership practices provide equitable access to resources, curriculum, programs, and opportunities. Darling-Hammond (1997) highlights the disparities in education by drawing attention to affluent communities and resources and across states. She cautions that such disparities are a threat to the foundation of a democratic society and claims, "The victims of social inequality and education inadequacy are trapped in a growing underclass…Ultimately, everyone pays, financially and socially, the resulting costs to the broader society" (p. 262).

Consequently, educational leadership is a challenge in today's schools; in fact, some leaders shy away from conflict and from the difficult conversations which must occur in order to move the organization forward. However, Glass (2003) discusses the role of conflict in a pluralistic society and says that conflict should be expected. Similarly, Shields (2009) asserts, "…it is…important for leaders to understand the critical positive role that conflict can play" (p. 139). In other words, in order to lead, leaders must understand conflict, challenge the status quo, and create opportunities for open dialogue and communication. To that end, leaders in a democratic society are faced with the challenge of creating dialogic, inclusive communities. Thus, the literature suggests community building as a critical role of the inclusive school leader. Through dialogue, a sense of community is established, which leads into the next section of the literature review, a focus on community.

Focus on Community

Building upon the inclusive leadership literature, school leaders must envision, create, and sustain a strong parent and community focus when creating an inclusive school community. Thus, parent and community involvement is a crucial piece of inclusive leadership. At its most surface level, parent involvement involves volunteering in classrooms, yet some school leaders reach beyond the surface to involve parents in dialogue surrounding policy and decision-making processes to promote inclusive school communities. The connection between inclusive leadership, social justice, community, and relationships is strong. As Riehl (2000) suggests:

> When wedded to a relentless commitment to equity, voice, and social justice, administrators' efforts in the tasks of sensemaking, promoting inclusive cultures and practices in schools, and building positive relationships outside of the school may indeed foster a new form of practice. (p. 71)

Building positive relationships, as Riehl suggests, is important to building community; however, little research has focused on how the various perspectives of school leaders contribute to a "better understanding of the concept of a community of difference" (Shields, 2002, p. 145). While the gap in the literature exists, there appears to be a strong connection between inclusive leadership and community.

School leaders must realize that schools are a critical element within the larger community that influence and shape students' lives. Oliva, Anderson, and Byng (2010) support that notion and suggest that school leaders must "…vigilantly monitor their interaction with stakeholders in the broader community out of schools" (p. 285). Without a strong community focus, inclusive leadership appears superficial, yet the aspect of community is vital. Peck (1993) argues the need for community when he states that there are very few "true communities" (p. 276). Thus, this next section will build on the idea of inclusive leadership and explore the notion of community.

Connecting Student Learning and Community

Community members, especially parents, express concerns about student learning. Inclusive leaders should make the connection between inclusive practices, the community, and student learning. Educating the community about inclusive practices is vital, and school leaders must provide inclusive practices which also emphasize student learning and improvement to teaching practices. School leaders must establish clear goals, collaborate often, take risks, and monitor the progress of students. Ryan (2006a) posits:

> Research is clear on the best ways of delivering curriculum in inclusive ways…it has found that students are generally included when the school honors different ways of knowing and different sources of knowledge, when it allows students to write and speak in their own vernacular, and when it employs culturally compatible communication styles. (p. 123)

In other words, school leaders must educate both the community and teachers on inclusive practices which will have an impact on student learning.

Inclusive leaders must educate their school communities on what fair and comprehensive assessment should entail. As previously mentioned, most school systems continue to operate under hierarchical, routinized structures because education reforms use evaluation tools which are exclusive instead of inclusive, which ultimately deskills teachers while excluding and marginalizing students. By understanding these processes, communities must work around these systems to include multiple, fair, and equitable assessments to measure student learning and progress (Ravitch 2010; Ryan, 2006a). As a result, by deskilling teachers and creating a high-stakes testing atmosphere, students who need the most support, low-income and minority students, have been marginalized (Shields, 2009). Lewis and Macedo (1996) suggests that power in education can impact marginalized students, and he discusses how students are "flung to the margins." If schools only focus on reading and math by the top-down, efficiency, bureaucratic notions of the past will not be able to move forward and progress to create democratic, inclusive communities.

In order for school communities to become more inclusive, they must be directly involved and engage in policy and decision-making processes. Ryan (2006a) suggests that all stakeholders are represented and that they have an "equal and fair opportunities to influence the outcome of the processes" (p. 128). However, Ryan also cautions that while some communities welcome this collaboration, some stakeholders do not wish to engage in decision-making at the school level because they feel powerless or silenced. Inclusive school leaders must get to know the community, find ways to give all stakeholders a voice into decision-making, and see the world from different points of view (Ryan).

Inclusive leadership practices are largely impacted by creating a sense of community. As community is developed in an inclusive school, differences are accepted as trust, safety, and belonging are fostered. Therefore, a strong connection between inclusive leadership, community, and democratic principles exists which incorporate the next piece of the literature review, dialogue.

Dialogue as a Foundation for Inclusive Schools

Inclusive leaders provide socially just and deeply democratic environments for all students. Through inclusive leadership, community is transformed and created to support inclusive practices. For both inclusive leadership and building community, one key element is essential, dialogue. "Dialogue is the very act of developing relationships with other people and with the subject matter itself…it represents a flowing through of ideas to promote reflection, critical analysis, and ultimately, democratic action" (Shields, 2009, p. 159). To build inclusive schools, leaders must recognize that dialogue is critical and the foundation for building such relationships. This next section will connect inclusive school leadership, community, and dialogue.

Understanding Dialogue

Dialogue seems, in its most simple sense, easy to understand; however, the notion of dialogue is intricate, complex, and transcends beyond the meaning of words or having a conversation with another person. Dialogue is not a new concept; in fact, scholars have long been completing significant research in the field of dialogue. However, competing viewpoints exist about the notion of dialogue. As an example, Burbules (1993) suggests:

> …the status of dialogue as a source of knowledge and understanding, as a medium for interpersonal discourse, and as a pedagogical relation has been a central topic of interest and dispute. Specifically, among various writers on education and society, especially those writing from contemporary "postmodern" perspectives, dialogue has been a focal point for debating broader conceptions of language, epistemology, ethics, and politics. (p. 2)

As a result, some scholars view dialogue as ontological, while others view it as a "relation we *enter into*" (Burbules, 1993) or as a tool for teaching and learning.

One such notion of dialogue stems from an ontological viewpoint. For example, Buber (1970) suggests dialogue as a fundamental way of life and supports the idea that dialogue is a relational ontology when he states, "All actual life is an encounter" (p. 62). He suggests the need to know one's students and community and to educate people through relationships for community (Buber, 1939). "Engaging in genuine dialogue enhances the possibilities for meaningful community, and for realizing our unique wholeness" (Kramer, 2003, p. 3). In other words, there is a strong connection between relationships, dialogue, and community. Bakhtin (1984a) also supports that connection and provides insight into dialogue as a way of understanding or a way of life. He states:

> To live means to participate in dialogue…In this dialogue a person participates wholly and throughout his whole life: with his eyes, lips, hands, soul, spirit, with his whole body and deeds. He invests his entire self in discourse, and this discourse enters into the dialogic fabric of human life. (p. 293)

Shields (2007) explains Bakhtin's philosophy of dialogue and states, "…for Bahktin dialogue is ontological- a way of living life in openness to other who are different from oneself, of relating to people and ideas that remain separate and district from our own" (p. 65). Similarly, Sidorkin (1999) refers to dialogue in an ontological sense that it refers to "human existence." Supporting the notions of Buber and Bakhtin, Sidorkin speaks to dialogue being the center of relationships. He states, "…we are truly human only when we are in a dialogical relation with another… Dialogue becomes the goal in itself, the central purpose of human life" (Sidorkin, p. 12). Therefore, these scholars view dialogue as a foundation of being.

On the other hand, some scholars view dialogue from a different perspective and do not treat it as ontological. As an example, Burbules (1993) takes a slightly different approach and describes dialogue as a social relation and a basis for teaching when he states:

> A successful dialogue involves a willing partnership and cooperation in the face of likely disagreements, confusions, failures, and misunderstandings. Persisting in this process requires a relation of mutual respect, trust, and concern- and part of the dialogical interchange often must relate to the establishment and maintenance of these bonds. (p. 125)

To that end, Burbules (1993) suggests "standards" or "rules" for successful dialogue which include participation, commitment, and reciprocity. Participation involves including all members so that people feel a part of the dialogue. Burbules explains, "Any participant should be able to raise topics, pose questions, challenge other points of view, or engage in any of the other activities that define the dialogical interaction" (p. 80). Commitment involves coming to an understanding, not necessarily an agreement, especially when conversation might be difficult. Finally, reciprocity suggests that dialogue is respected and "cannot assume that people will speak the same way, mean the same things, or share the same concerns when they speak" (Burbules, p. 37). In addition, reciprocity also encompasses "a spirit of mutual respect and concern, and must not take for granted roles of privilege or expertise" (Burbules, p. 82). Nevertheless, Burbules reminds us that these "rules" are beneficial but only take us "part of the way toward understanding" dialogue.

While scholars discuss dialogue through both ontological and non-ontological perspectives, the importance of dialogue in schools is clear. Similar to several other scholars, Shields and Edwards (2005) caution that "Dialogue is not just talk." Thus, the point in sharing different perspectives of dialogue is to understand that dialogue is not a new term, concept, or phrase; rather, it is a "way for us to understand something or someone who is in some way different than ourselves, who has a different perspective, alternative lens, varied history…" (Shields & Edwards, p. 15).

Power and Dialogue

Power hierarchies and structure plague school systems and influence dialogic relations. Therefore, the literature suggests that dialogue is vital to understanding and examining inclusive leadership, community building, school change, and educational reform. For example, Sidorkin (1999) suggests the importance of dialogue in schools and states, "…it is the lack of language for describing what works in schools that among other things prevents educators from turning every school into a good place to spend one's childhood" (p. 2). To support that point, Ryan (2006a) urges that school leaders provide inclusive schools which give students a voice. He states, "Everyone must have an equal opportunity to speak and must respect other members' right to speak out to feel safe to talk; all ideas must be tolerated and subjected to fair assessment" (p. 120). For schools to become inclusive, scholars suggest that dialogue must be at the heart of inclusive leadership practices, and power imbalances must be minimized or eliminated.

Power structures are not only prevalent in inclusive leadership practices but they also influence dialogue in the school setting, where marginalized groups are often silenced because of power and dominance. Delpit (1988) examined "silenced dialogue" and the culture of power that exists in society today and analyzed five rules of power that impact African American students and students from poverty. These five rules of power are as follows:

1. Issues of power are enacted in classrooms.
2. A culture of power exists—there are rules to participate in power.
3. The rules of the culture of power are a reflection of the rules of the culture of those who have power.
4. If you are not already a participant in the culture of power, being told explicitly the rules of that culture makes acquiring power easier.
5. Those with power are frequently least aware of—or least willing to acknowledge—its existence. Those with less power are often most aware of its existence (p. 283).

Although Delpit analyzes these rules to show educators power structures within the classroom and their impact on learning, Delpit's culture of power becomes relevant to inclusive school communities as well. As an example, Delpit stresses the importance of all educators, White or minority, acknowledging that power is prevalent in society and in our classrooms when she asserts, "to act as if power does not exist is to ensure that the power status quo remains the same." Furthermore, Delpit challenges educators to work with African American parents, teachers, and members of poverty-stricken communities when she says:

> I am suggesting that appropriate education for poor children and children of color can only be devised in consultation with adults who share their culture. Black parents, teachers of color, and members of poor communities must be allowed to participate fully in the discussion of what kind of instruction is in their children's best interest. Good liberal intentions are not enough. (p. 296)

In this way, Delpit stresses the importance of dialogue as a means to better understand the needs of marginalized populations. Although Delpit's ideas are specific to the classroom, she addresses power and inclusivity in a broader sense when she asserts:

> The dilemma is not really in the debate over instructional methodology, but rather in communicating across cultures and in addressing the more fundamental issue of power, of whose voice gets to be heard in determining what is best for poor children and children of color. (p. 296)

Delpit's ideas are critical to examine in light of this study because they directly relate to how power structures can ultimately silence marginalized groups of individuals. Thus, Delpit argues the idea that successful relational dialogue is directly related to notions of power structures and inclusivity.

Bakhtin's notion of *carnival* suggests an avenue to break down hierarchical barriers and power inequities. Rather than applying rules to situations, Bakhtin's approach to carnival suggests ways of viewing alternatives to power hierarchies. For example, Bakhtin (1984a) states:

> Carnival is the place for working out, in a concretely sensuous, half-real and half-play acted form, *a new mode of interrelationship between individuals*, counterposed to the all-powerful socio-hierarchical relationships of non-carnival life. (p. 123)

In a school sense, power structures, hierarchies, and titles are suspended. He states, "…one might say that carnival celebrated temporary liberation from the prevailing truth and from the established order; it marked the suspension of all hierarchical rank" (Bakhtin, 1984b, p. 10). Carnival provides school leaders with an option to suspend power so true dialogic relations may occur.

In order to challenge power structures and hierarchies in schools, all stakeholders' voices must be heard. Ryan (2006a) suggests, "At its best, dialogue encourages the inclusion of voices not normally heard" (p. 122). He provides suggestions for school leaders and suggests dominant individuals, or those in power, abandon their influence when participating in dialogic settings. However, he cautions:

> It would be naïve to think that dialogue in itself, however, can ensure that the marginalized will overturn the entrenched power relationships that exclude them from many of the advantages that others enjoy. Relationships among classed, raced, and gendered students, educators, and parents are difficult to overcome in the classroom and the school. (p. 122)

In other words, educators should be aware that challenges exist when power imbalances are prevalent in school systems, but they should also promote and encourage dialogue to suppress such barriers. On the other hand, some scholars, like Burbules (1993), suggest authority has "legitimacy," and that "a dialogical relation should be aimed toward making authority superfluous; but authority, properly conceived and sensitively exercised, can be a helpful element in attaining that end" (p. 35).

Inclusive school leaders strive to diminish power imbalance while creating inclusive practices in school settings. Shields (2009) acknowledges such barriers and issues of power and calls upon educators to "engage in dialogue that promotes understanding of the ways in which [power issues] create barriers to equal democratic citizenship" (p. 95). As a result, leaders must understand the power imbalances prevalent in school systems and use a dialogic framework to create communities of difference in inclusive schools. This next section provides practical applications of inclusive practices for school leaders.

Practical Application of Inclusive Practices for School Leaders

I often find myself asking, "How can we 'do school' better?" Most recently, I attended a school musical for my 3-year-old son. It was my first experience at a school as a parent, and not as a teacher or administrator. As I looked around the room, I noticed excited parents, siblings, and family members, all waiting for preschoolers and kindergarteners to take the stage. As each group of 3- to 5-year-olds performed, I watched their enthusiasm for learning and performing. I had to ask myself, "Every single one of these children love school. What happens from now until 4th, 5th, 8th, and 10th grade when we see students disengage from learning?" Many blame parents. Some blame the students. But how often are we looking in the mirror and asking, "How are our current school structures negatively impacting our students?"

Thus, school leaders are faced with a myriad of challenges in their daily work. In order to create an environment of academic excellence, principals must focus on principles of social justice. I argue that school leaders, including teacher leaders, must expect that schools have both academic excellence and equity in order to create and sustain school systems which engage students—from preschool through university. This next section will infuse theory and practice and will provide some practical examples of how notions of dialogue, access, equity, and opportunity are connected to the ideas of inclusive school communities.

While some of these practices are common in schools, I am choosing to highlight certain areas to point out their importance when striving to create an inclusive community focused on dialogic relations. As you read these next sections, I invite you to rethink my practices in your own context of education and issues surrounding social justice in schools.

Faculty Meetings

For school principals, faculty meetings are a common practice and can be an opportunity for collaboration, dialogue, and communication. However, the day of the mundane faculty meeting where the principal provides an agenda and reads dates to the faculty is a thing of the past. Shields (2009) reminds us that we must bring dialogue into our schools when she states, "As educational leaders, we must be present through initiating and facilitating the dialogue that permits all voices to be heard" (p. 111). Thus, in order to create an inclusive environment focused on principles of social justice, school leaders must change the way they have historically structured faculty meetings and should focus on school improvement and professional development.

In an inclusive school community, faculty meetings are opportunities for staff to collaborate, communicate, and dialogue about a variety of topics. It is at this common practice within schools that a principal can begin to create community. Within an inclusive structure, the agenda of a faculty meeting is created by the staff, not the principal. In other words, the staff drives the agenda by providing the principal with agenda items prior to the meeting. While the principal still has an active role, the staff is held responsible to create the agenda. At the meetings, the principal serves as a facilitator of the discussion and is part of the whole discussion within the community, not the sole leader of the staff.

In keeping with that philosophy, a collaborative meeting focused on dialogue allows for opportunities of reflection as well. At each meeting, staff is asked to provide feedback for reflection. As an example, staff members are given Post-it Notes on their tables and are asked to provide questions, suggestions, concerns, and kudos for the topics discussed at the meeting. After the meeting ends, the principal examines the feedback, makes comments as necessary, and sends the feedback out to the staff. A process such as this provides continuous dialogue and feedback from staff to staff and opens the lines of communication for school improvement. Those individuals who are less likely to speak in front of large group of peers are more likely to voice their opinion when able to write their feedback anonymously on a Post-it Note.

Faculty meetings are also an opportunity for school principals and teachers to present current research and have dialogue about topics which are not often discussed in schools. Sidorkin (1999) reminds us of the need to include dialogue in schools when he says that "it is the lack of language for describing what works in schools that…prevents educators from turning every school into a good place to spend one's childhood" (p. 2). As an example, principals often utilize faculty meeting time to analyze student data. When analyzing the data, oftentimes, schools see achievement gap data relative to Caucasian students and minority students. While staff then knows and understands the gap exists, rarely do we ask questions such as: *Why does this gap exist? What is causing the gap in our school? What are the bigger implications to this type of an achievement gap?* In a school focused on principles of social justice, educators will try to understand the root of the problem just as much as they try to find solutions to the problem.

School Leadership Teams

Many schools in the United States have school or building leadership teams. It is important to understand the structure of the leadership team and how that structure either enhances or prohibits dialogue, equity, and access. Ryan (2006a) reminds us that critics argue that shared decision-making and collaborative processes "will waste people's time, delay important decisions, raise operating costs, and increase workloads. But if hierarchies remain, efforts at inclusion will also be fake…" (p. 13). Thus, creating leadership teams that are truly inclusive are a critical role of a school principal.

Many leadership teams are comprised of administration and teachers, and while the relationship between staff and principals is necessary and encouraged, it does not include all stakeholders in the learning community. Therefore, a school leadership team should be comprised of teacher representation from all grade levels and subject areas, administrative representation, support staff representation, student representation (all grade levels), and parent representation. Student and parent representation should reflect the school's demographics as well. In other words, in a school with 50 % minority students, the parent representation should not be only Caucasian parents. In addition, agendas should be driven by the members of the leadership team, not the school administration. When the administration and teachers are the only individuals who set the agenda, students and parents from disadvantaged backgrounds can be excluded, denied educational opportunities, and silenced in the school setting (Ryan, 2006b; Shields, 2009).

Student Focus Groups

While it is important to include students into the leadership team, it is also important to give students a voice into every aspect of the school community. One way to provide a voice for students is through Student Focus Groups. Student Focus Groups are comprised of groups of students who meet with the building leadership on a monthly basis to give feedback about the school. Each month, a random group of students are selected to have lunch with the principal. Ryan (2006a, 2006b) suggests that the task for leaders "is to raise the consciousness of people so that they can recognize widespread and harmful exclusive practices like racism and sexism and do something about them. This requires that school communities perpetually raise questions about what they do and about the wider context within which learning and schooling occurs" (p. 58). Such questions should not only be posed to teachers, as students can benefit from questions which raise their own consciousness. For example, during focus group meetings, students are asked questions such as the following: *What do you like about our school? What do you dislike about our school? What would you tell other students who don't attend here about our school? If you could make any changes to our school, what would they be and why? What do you think about our curriculum and courses? Do you ever see people treated unfairly? If so, when and where? What do you think about our homework policy? What do you think about our school policies, rules, and procedures? What ideas do you have to make our school better?*

Students are encouraged to answer freely, openly, and honestly during the process. No student names are written during the focus groups, yet notes are collected and distributed to staff and parents. As a result, school improvement efforts are focused on student needs, and students feel that they have a "voice" into the school community, thus challenging the structures in school which create silence for marginalized parents and students.

Engaging Parents and Community

Oftentimes, educators become frustrated with the lack of parent engagement and communication; however, it is the school's responsibility to actively engage parents into the learning and decision-making processes at schools. For many schools, Open House and Back to School Night are the most heavily attended evenings in the school. During Open House, the school principal has a responsibility to actively engage parents and set the tone for parent engagement and involvement throughout the year. Ryan (2003) reminds us that "Principals are in ideal positions to promote inclusion…Moreso than perhaps any other individual, they have the power to shape leadership practices that are consistent with inclusion" (p. 171).

At Open House evening, schools should open the dialogue to hear from parents what they like, or dislike, about the school system, including providing anonymous opportunities to share their feedback about curricula, programs, operations, activities, and communication. This process can easily be accomplished by giving parents a survey when they enter the building. The next step would include the leadership team to analyze the results and then create a plan of action to address parental needs and concerns. Finally, the plan should be communicated back to the parents, so they know their voice was heard and that concerns were taken seriously.

For schools with high percentages of minority students and for schools in high poverty communities, it is imperative that principals plan accordingly to prepare for such events. As an example, transportation should be provided for parents who cannot provide their own, translators should be on-site, and principals should communicate in the parents' home language about translation services, transportation, and childcare prior to the evening. In addition, principals should take time during the summer months to call parents personally and invite them to Open House evening and welcome them back to the school year. While principals may not be able to make calls to every single family for large schools, they can provide phone blast calls to go out to parents as reminders.

During Open House, gaining feedback from parents about what their children need is a critical component to creating an inclusive environment. A quick and easy way to get feedback is to put posters up in the building with sticky notes below for parents to give suggestions. Parents can provide input about curriculum, school programs, transportation, operations and procedures, activities, clubs, sports, extracurricular opportunities, and communication. Parents should be asked what the school is doing well and what can be improved. Data received from these events should be discussed and analyzed by school leadership team members, and communication should go back out to the stakeholders about next steps. Follow-up communication is a vital piece of the process.

Additionally, principals must actively engage parents by communicating with them on a routine basis. Principals should have parent and community e-mail lists to send out reminders and pertinent information. Similarly, school leaders must be active and engaged within the larger context of the community itself. Presence at community events, communicating with local agencies, and being visible in the community are all vital roles for principals striving to create an inclusive environment focused on principles of social justice.

Home Visits

Parents are critical members of the school community. Riehl (2000) reminds us of the impact of a school administrator's role of fostering a new form of practice when committed to the notion of social justice when she says:

> When wedded to a relentless commitment to equity, voice, and social justice, administrators' efforts in the tasks of sensemaking, promoting inclusive cultures and practices in schools, and building positive relationships outside of the school may indeed foster a new form of practice. (p. 71)

Thus, home visits to families are a necessary practice in order to build community. In today's economic downturn, we have parents who work several jobs to make ends meet for their family, or other parents might have had a negative school experience when they were in school. For these parents, coming to school functions and events can be difficult due to work schedules or due to anxiety from their own contextual experiences. Therefore, another strategy for school leaders seeking to create inclusive schools is to complete home visits. Home visits are opportunities for school leaders to visit the home of a student within the school community and visit with several parents at one time to better understand the needs of the community.

One way to maximize the impact of home visits is to structure it to a specific group of parents. As an example, if a school has an English Language Learner (ELL) population of students whose parents do not speak English as their first language, the principal can set up a visit to their home and bring a translator. I have completed a similar visit and found that parents have a deep and profound respect for our schools. Many of them indicated that they completed research prior to moving because of their love of education and the importance of it for their children. Similarly, parents attended the home visit and had never attended a school event prior to that time, other than Open House. When asked why they only attend Open House and not other events, like parent/teacher conferences, they responded that they attend Open House because the "teachers talk to them, and they can understand English." They shared that they did not attend other events like conferences because "we can't speak good English, so it's embarrassing." Some parents also indicated that they did not call their children in sick to school because they know that the secretaries will not understand them. They impressed upon us that they care deeply about their children's education but that they do not know how to navigate the school system itself. Without making the efforts to reach out to families, school principals and teachers make assumptions about families and are not able to truly understand families' needs and expectations unless they take the time to reach out and complete home visits.

Conclusion

I have had the privilege to present with colleagues at several conferences in the past few years, and through that experience, I have found that educators, especially teachers, are eager to hear about topics of social justice and dialogue in schools. Often, after presentations where, as a principal, I make comments such as "If students are being called 'terrorists,' they don't care about your math or science test, so we need to address the social concerns of our school in order to have high quality, academic excellence," I am bombarded with questions from teachers about how they can infuse more dialogue into their schools and classrooms.

As educators, we have the most difficult and most important job in the world. We are faced with great challenges. I argue that we must stop limiting our students' opportunities by archaic school structures and, instead, open our hearts and minds to engaging practices in schools which open—and expect—equitable access for each and every student. Students, like Ahmad, are counting on us to provide the most quality educational experience for them.

We are at a critical time in education, yet this could be one of the most exciting times in education. Federal reform efforts continue to be at the forefront of agendas for politicians, educators, and parents, and principals continue to feel under pressure to meet the demands; however, the seeds of hope in education are in the notion of including dialogue into our schools and classrooms. This chapter has sought to provide information about inclusive school communities that are focused on principles of social justice. I have argued that schools must be both academically excellent and socially just to be considered inclusive environments, yet most schools lack opportunities for dialogue to occur. In order to provide opportunities for students and parents, principals are charged with the task of creating spaces for dialogue among all stakeholders.

Practical application strategies have been provided in the chapter as specific examples of ways in which principals can create spaces for dialogic practices to occur. I call upon all educators to rethink my practical application practices in your school contexts and to have the moral courage to stand up to marginalizing structures and practices in our schools in order to meet the needs of all students, especially students like Ahmad, who come to school not just wanting to feel safe but also to be heard.

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Chapter 25
Narrative Dialogue and Teacher Leadership for Social Justice: Re-Storying to Understand

Lindsayanne Insana, Daniel Johnson Mardones, Hilarie Welsh, and Marilyn Johnston-Parsons

> Our stories are the masks through which we can be seen, and with every telling we stop the flood and swirl of thought *so someone can get a glimpse of us,* and maybe catch us if they can. (Elbow, 1986, p. 69)

The stories we tell ourselves and others are always subject to change because we continue to live our lives. Telling our stories is a way for us to "catch" ourselves in a moment in time and reflect on who we are; also, as we choose how to narrate our lives for others, they catch a glimpse of us in the stories we tell them.

In this chapter, we use narrative dialogue both to demonstrate a method of inquiry and to advocate for a narrative approach to develop teacher leaders for social justice. Two of us (Lindsayanne and Hilarie) wrote narratives that we re-storied (Clandinin & Connelly, 2004) as we engaged in an extended dialogue about our narratives for the purpose of writing this chapter. In this process we came to new understandings about ourselves as leaders for social justice.

The four of us knew each other well before we began this narrative dialogue. As three doctoral students and an adviser (Marilyn), we had talked about our lives as teachers and doctoral students. We were comfortable talking about teaching and academic ideas; yet, we had quite different backgrounds. Lindsayanne was beginning her second year as a doctoral student after having taught 7 years; Hilarie was writing her dissertation in her fourth year of the doctoral program and had previously taught for 6 years; Daniel was a first-year doctoral student from Concepción, and had completed a master's thesis using narrative life histories; and Marilyn was a professor with research interests in collaboration research and teacher education. In spite of these differences, we enthusiastically embraced this project of writing about teacher leadership.

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Telling Stories

We began working on this chapter with Lindsayanne and Hilarie writing narratives about their individual experiences as teachers.[1] We weren't inclined to label these as stories of leadership; we thought of them more as stories of "jobs" Lindsayanne and Hilarie took on within their teacher roles.

We (the authors) began an extended dialogue about our narratives in light of the goals of this chapter—teacher leadership for social justice. In the process, we re-storied our narratives as examples of teacher leadership and later of teacher leadership for social justice. The dialogic process led to new understandings of the same events.

Talking about *teacher leadership for social justice* took us on a journey into a field largely dominated by a focus on principals. As we read and noticed the gap, we wondered if the emphasis on principal leadership was a result of teachers not considering themselves as school leaders, especially not as leaders for social justice. We also wondered whether other teachers are also working as teacher leaders without identifying their work as such. It is also true that studying and valuing teacher leadership is a fairly recent phenomenon. Our approach to it is unique because we are using narrative dialogue and this contrasts with the logical-deductive view, which has long dominated the study of educational leadership.

Literatures That Informed Our Understanding

Readings in several areas helped us situate our narratives within the literature related to leadership, social justice, dialogue, and narrative. Each of these literatures influenced our work on this chapter.

Leadership

The literature on educational leadership has evolved over the last few decades. It began with a focus on *theories* of leadership and has gradually included studies of actual educational leadership and empirical evidence for its theories. However, it has been difficult to capture the complexity of the phenomena that it studies (Young & Lopez, 2011). This limitation is related to its concentration on the principal's leadership, a narrow methodological approach, and ignoring the social context in which schooling and educational leadership takes place (Young & Lopez). Until the 1980s, issues of social justice were marginalized, if not completely absent. None of the main theories of educational leadership, such as transactional leadership (Burns, 1978), distributed leadership (Leithwood, 2001), collaborative leadership (Sergiovanni, 1992, 2007), and transformational leadership (Bass, 1985; Leithwood, 2001), explicitly address issues of social justice.

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[1] As a collaborative effort using narrative writing, pronoun use is complicated. In particular, I/we distinctions are not always easy to determine. We sometimes write using a plural "we" meaning the four of us as authors, indicated by "the authors." We spent a lot of time talking and came to some shared understandings of the two narratives we chose as examples for this chapter. At other times the "we" means only the specific narrative author(s) (Lindsayanne or Hilarie). In this case, we include their names.

Leadership for Social Justice

Leadership for social justice was born as a way to fill this gap. Recently, some have argued for social justice as a moral imperative of school and professional practice, including it in approaches such as transformative leadership (Shields, 2004a, 2010), dialogic leadership (Brown, 2004), Freirean leadership (Miller, Brown, & Hopson, 2011), and leadership for social justice (Theoharis, 2007). A number of current studies have focused on how to develop programs for leadership for social justice (Bell et al., 2008; Printy, 2008; Tillman, 2005). These newer approaches tend to use the terms *transformative, social justice, and dialogic* interchangeably, and Paulo Freire's influence is common in this literature (Bell et al., 2008; Printy, 2008; Tillman, 2005).

Shields (2009) attempts to clarify the concept of transformative leadership, arguing that it goes well beyond the traditional understandings of leadership for school improvement. It also goes beyond rational and technical approaches to educational change, in that its focus is on "promoting a form of education that may achieve its transformative potential" (p. 5). Shields differentiates transformative leadership from transactional and transformational leadership, emphasizing their distinct starting points, foundations, emphases, processes, key values, goals, power, concepts of leadership, and related theories (Shields, 2009, 2010).

The concept of dialogue is central in many of these theories; some of them talk specifically of dialogic leadership (Brown, 2004; Shields, 2004b). Personal relationships, moral dialogue, and sensemaking processes are acknowledged to be central in a socially just school. Also central are daily conversations about issues of power, race, social inequality, and gender, and especially giving voice to those who are frequently marginalized socially and educationally. Miller et al., (2011) propose a theory of leadership based on Freire's concept of dialogue, identifying his concepts of humility, faith, hope, critical thinking, and solidarity as key characteristics.

Theoharis (2007) prefers to talk simply of "social justice leadership" where "principals make issues of race, class, gender, disability, sexual orientation, and other historically and currently marginalizing conditions in the United States central to their advocacy, leadership practice, and vision" (p. 223). For Theoharis, the focus of leadership for social justice is facing and eliminating marginalization in schools. Overall, scholarship that marries leadership and social justice is relatively new, and most of this work is oriented to school administrator leadership or programs to develop school principals (Shoho, Merchant, & Lugg, 2011).

Teacher Leadership for Social Justice

Beginning in the 1980s, the concept of teacher leadership emerged as fundamental to school reform and educational change (Fullan, 2001; Smylie, 1997). An increasing body of research on teacher leadership evolved but few included issues of social justice. Smylie analyzed 208 research studies on teacher leadership and divided them into four areas of investigation: lead and master teachers, career ladders, teacher mentoring, and participation in decision making. He concluded that this body of work does not provide a satisfactory definition of teacher leadership. The absence of a clear definition has often been mentioned in the literature, even in the 2000s (Angelle & DeHart, 2011; York-Barr & Duke, 2004).

York-Barr and Duke (2004) define teacher leadership as a "process by which teachers, individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement" (pp. 787–788). Silva, Gimbert, and Nolan (2000) define the evolution of teacher leadership as a three-wave process, beginning from the moment in which a teacher assumes the formal role or position of teacher leader, primarily as manager of a system already in place; followed by a second wave when the teacher leader is primarily focused on instructional knowledge, team leadership, and staff development positions; and finally a third wave in which teachers develop a culture of collaboration and learning. Silva, Gimbert, and Nolan found teachers with third-wave skills and approaches were "unable to rally the skills and spaces necessary for effective leadership to occur" (p. 799).

The distinction between formal and informal roles for teacher leaders is much discussed in the literature. Also much discussed is the existence of participation spaces as a requirement to develop teacher leadership. Murphy (2007) has pointed out that organizational structure, professional and organizational culture, norms about teaching and learning, and the nature of leadership work can all function as barriers to teacher leadership. On the other hand, clear values and expectations, training, resources, incentives, recognition, and role clarity can support it.

There is an evolving literature on the ways in which Communities of Practice (CoPs) and Professional Learning Communities (PLCs) nurture teacher leadership (DuFour & Eaker, 2005; Fullan, 1993; Lambert, 1988). In these communities, teachers work collaboratively to promote change (Lieberman & Miller, 2004; Louis & Marks, 1998). Leadership is distributed and fluid as teachers take on shifting roles without institutional role designations (Spillane & Diamond, 2007). Cochran-Smith and Lytle (2009) argue that "… they [PLC and practitioner inquiry approaches] recognize the central role of teachers and practitioners in shaping the life of schools and as agents in transforming the work of schools" (p. 53).

While the research and writing on teacher leadership significantly informed our work, there was little to help us in the area of teacher leadership for social justice. Here we depend on adapting work in social justice leadership with principals.

Social Justice

Defining social justice in the context of teacher leadership is challenging. We found the approach taken by Shoho et al. (2011) appealing and fit our experience of using narrative to uncover our understandings of teacher leadership for social justice. Shoho and colleagues found a *process* more important than a definition:

> In attempting to define social justice, we discovered that the process may be more important than the outcome. Although a precise conceptual definition could not be constructed, the framework for a common language and shared understanding was developed. (p. 61)

In our work, we found some underlying concepts that guided our process. For us, understanding social justice was dependent on two other interdependent concepts—*dialogue* and *difference*. Both of these were critical to the development of our narrative and our collaboration in writing this chapter; they are both in our recommendations at the end of this chapter.

Dialogue is more than comfortable conversation and more about learning than solving problems. It is the process we used to interrogate our work as teachers and as teacher leaders. Shields and Edwards, in *Dialogue is Not Just Talk* (2005), define dialogue as “a dynamic force that holds us in relation to others and deepens understanding” (p. 4). Dialogue requires equity among discourse partners and openness, including a willingness to welcome differences as opportunities for learning rather than personal affronts to individuals. It feeds on differences in ideas and interpretations, rather than requiring consensus. Differences help us think better about our own ideas as we learn from those whose perspectives differ from ours.

Dialogue and difference within a democratic context nurture social justice. Shields (2004a) calls this kind of dialogue a “moral dialogue”; it requires leaders to provide “opportunities for all children to learn in school communities that are socially just and deeply democratic” (p. 110).

Bakhtin (1981) writes about dialogue this way:

> A dialogised word can never be zaverseno (completed). The resonance or oscillation of possible meanings within it is not only not resolved (nezaverseno), but must increase in complexity as it continues to live. (p. 426)

For Bakhtin, we continue to learn as contradictions and complexity keep resonating during an ongoing process of creating meaning. Complexity interrupts comfortable interpretations of our stories. As we face contradictions, dialogue allows us, sometimes requires us, to re-story our narratives. We used dialogue to uncover the hidden layers of meanings in our narratives.

Narrative Dialogue

We used narrative dialogue to (a) develop the narrative writing and ideas for this chapter, (b) analyze our stories of teacher leadership for social justice, and (c) make recommendations for professional development of teacher leaders. To do this we depended on the literature on narrative in general (Davies & Harre, 1990; Gergen & Gergen, 1986; Polkinghorne, 1988; Ricoeur, 1983) and, more importantly, teacher narratives within educational contexts (Clandinin & Connelly, 2004; Florio-Ruane, 1986, 2001; Johnston & PDS Colleagues, 1997; Johnston-Parsons & PDS Colleagues, 2012; Olssen, 1990; Witherell & Noddings, 1991). Bruner (1990) argues that the power of narrative is that it renders "the exceptional and the unusual into comprehensible form" (p. 47); Ricoeur sees stories as models for redescribing the world. Connelly and Clandinin (1990) claim that we all live "storied lives" and, in particular, that narrative is a typical way that teachers describe and make sense of their professional lives.

Narrative as a Process of Re-Storying

> Any story one may tell about anything is better understood by considering other possible ways in which it can be told. (Bruner, 2004, p. 709)

We began our work for this chapter by telling stories of our teaching experiences. We did not initially call them "teacher leader" stories; rather, they were things we did as teachers that we thought were important. As we wrote, talked, rewrote, and talked again, we came to see these narratives as instances of leadership with deeply embedded issues of social justice. Here are our re-storied narratives.

Lindsayanne's Story

I credit my first-year teacher mentor with the longevity of my teaching career. Without her, I would have quit teaching after my first year on the job. I was hired at a diverse, Title I school, next to the projects of Fairfield, California. On the second day of school, my classroom door opened and five men and women dressed in suits walked in to observe my teaching. Apparently, my school was failing (a fact that was not shared with me when I was hired) and the state had taken over. The suits were California state board members and they were there to assess my teaching skills and the behavior of the students and to gain an overall picture of the "problems" at my school. I remember thinking at the end of the first week, "How am I going to get through a whole year of this?"

Over the next few weeks, my colleagues and I were introduced to various consultants, academic coaches, and trainers who I saw in my classroom more often than my administrators. Because I was a first-year teacher, it was easy for the administration and the academic coaches to come down hard on me. After all, I was brand new; what did I know? The constant evaluating, assessing, and critiquing would leave me in tears, often minutes before my students returned to the classroom. The physical, stress-related pain was one thing, but the daily emotional turmoil was soul crushing. The absolute worst part of this first year of teaching was the constant reminders that I was not worthy of being in front of the class and educating these young children.

It was around this time that I was introduced to my beginning teacher support provider, Mary Brown (pseudonym). She was hired by the California Department of Education and the Commission on Teacher Credentialing as a full-time mentor to support me and the other first- and second-year teachers. Although her primary job was to help me fulfill the requirements of the California Multiple Subject Credential, she far exceeded that. Mary provided support in the form of warm advice, creative lesson ideas, chocolate, tissues, and hugs. Her all-inclusive support made me realize that I was not a bad teacher; I was simply in the wrong environment. I left that school after a year, moved to southern California, and blossomed as a young teacher. I never forgot about the encouragement and assistance Mary gave to me. I carry it with me still.

When I moved to Tennessee 3 years later, one of the first things I noticed about the district was the lack of support for new teachers. During my first week, an instructional facilitator, who came to observe me and offer some limited resources, approached me. I found out later that she was one of three people hired to service over 1,500 elementary teachers in the district. The lack of new teacher support was shocking to me.

During my first year in Tennessee, nine teachers were hired at my school, three of who were first-year teachers. At the end of that year, only one of the three first-year remained on the job. Of the two that left, one left by choice and the other was not asked back. Memories of my first difficult year came flooding back. The lack of beginning teacher support was leaving its ugly mark and I could no longer ignore it.

At the beginning of the next year, my fifth year as a teacher, I approached my principal, with whom I had a great relationship. I expressed my concern about the lack of new teacher support at the district level and suggested that we implement a mentoring program at our school. I would volunteer as the program's coordinator and also offer my services as a mentor. I felt strongly that the new teacher attrition rate would continue if we did not offer some kind of support service. Mary Brown made such an impact on my teaching career that I felt compelled to "pay it forward."

The new teachers at my school, and their students, were at a disadvantage because they were not provided with mentoring services. I was convinced that a well-organized, teacher-centered mentoring program would help both the new teachers and their students. My principal was excited about the idea and asked how he could support me. I suggested a survey to assess the beginning teachers' needs, pairing each new teacher with an experienced mentor (preferably in the same grade level) and conducting regular meetings on topics generated by the new teachers and the principal. I approached two teachers to ask if they would become mentors for our new teachers; they both agreed. I became the third mentor. As a group, the mentors and I collaboratively defined our roles and responsibilities. We agreed to meet once a month with our mentees to discuss topics such as communication with parents, assessment, and organization. I also asked both the beginning teachers and mentors to record their responses to their meetings with their mentors and to give them to our principal and me. This provided regularity and accountability for both the mentors and the mentees. Additionally, the mentors agreed to check in with the mentees informally, at least once a week, about matters ranging from behavior issues to balancing work life with personal life.

At the end of the school year, I asked the beginning teachers to reflect on their experiences of being the "guinea pigs" of our mentoring program. All three reported positive experiences. One of them said that she had no idea how she would have survived her first year without the support of her mentor. I also viewed my experience of leading this mentoring program positively. If I could encourage at least one teacher to be the best teacher she can be, I felt I had succeeded.

When I first shared this story with our writing group, I thought of it as a job that I more or less assigned myself to help out the new teachers. Initially I was skeptical that this was a teacher leader story and I had no inkling that it was a narrative about teacher leadership for social justice. It took some time before I felt attached to either of these descriptors.

Hilarie's Story

I was pleasantly surprised during the summer before my third year of teaching when the school's instructional coach asked if I would be chairperson of the 9th grade Small Learning Community (SLC). I considered 9th graders to be a fairly marginalized group because their voices were not as valued as the older students' and teachers often tried not to "get stuck" teaching the youngest students in the school. Students of color were especially marginalized. It was an all black school before desegregation, and a Visual Performing Arts (VPA) magnet program was created to diversify it. Nevertheless, we were a segregated school. Black and Latino students populated lower tracked classes, while honors courses were composed almost entirely of White students in the VPA program. I looked forward to my new role as SLC chairperson and hoped to advocate for the 9th grade class as a whole, knowing that our services were particularly critical for students of color.

This "small school" idea was new to the district and was designed to help ensure the 9th graders' academic and social success. The SLC space consisted of 9th grade classrooms and a central office housing workspace for students, an administrative assistant, guidance counselors, and reliable volunteers. Our 9th grade administrator was located in the central administrative building, but he spent much of his time in the SLC area. Some of the changes associated with the SLC were not welcomed. Because not enough teachers volunteered to teach in the SLC, the principal assigned them, and some of them felt it was a punishment. Plus, the 9th grade teachers sensed resentment from upper level teachers who thought we were babying the 9th graders. Teachers of upper level students asked what would happen when 9th graders were promoted to 10th grade and did not have the same supports. They said that while the 9th grade failure rate might decrease, the students would fail during 10th grade.

As a third-year teacher, I was still new to the profession. While none of my colleagues were overtly rude to me, I was aware that some teachers quietly questioned why I was chosen to lead the SLC endeavor. More experienced teachers, some of whom held graduate degrees in leadership, a degree I had just begun, were especially grudging. While these attitudes placed extra pressure on me, I did not overly concern myself with the naysayers; rather, I acted confidently (even when I was not) to create a community that would improve the success of the 9th grade students. During this experience, I always kept the students' best interests in mind.

Because the SLC concept was new to the school and my role as chairperson was ill defined, many of my early decisions were made in collaboration with the 9th grade guidance counselors and administrator. Due to some teacher resistance, we decided that the first official SLC meeting would serve as an informal icebreaker. While the teachers visited with each other, the 9th grade administrator prepared Cuban sandwiches, a local favorite. The informal get-together seemed to relieve some of the tension, paving the way for the formal, monthly meetings that would follow.

Early in the year, our meetings focused on troublesome student behaviors, and situations such as truancy, gang involvement, and pregnancy. During our meetings, I made it clear that I was not interested in changing the way teachers instructed or assessed; rather, our goal was to open lines of communication between parents, students, and teachers and to create supports and interventions to help promote success. We spent time looking at student attrition and course failure data, which conveyed the importance of our work. As the teachers realized that changes in their classrooms would not be imposed, resistance slowly resided.

Conversations at our meetings shifted focus during the fifth week of school, just after progress reports were distributed. The 9th grade counselors identified students with failing grades, and I drafted letters to inform their teachers and parents. I assigned students a tutor when needed, they received extra counseling, and other interventions were put in place as necessary. For example, we decided that if a student was failing classes due to time spent in In-School Suspension, I worked with the 9th grade administrator so that he could give a penalty other than In-School Suspension to that student with behavior issues. Further, teachers communicated with each other to ensure students' success. For example, if a student performed well in my English class but struggled in science, I would periodically send the student to his or her science teacher during English class to catch up on work or to get extra help. Because I was aware when students struggled in classes other than my own, I was able to check with students on their progress and provide motivation. The 9th grade teachers were working together in ways that had rarely been seen at our high school. Even those who were initially resistant slowly embraced the community concept because they saw it working.

The positive results were numerous. Students who at one time chronically skipped classes began to attend more consistently. I remember one student telling me that he no longer skipped class because his teachers bothered him so much if he missed class. He was referring to his afternoon teachers asking him daily if he made it to his morning classes, to the phone calls home, and to the full-time volunteer who would knock on the door of his home if he didn't show up to first period on time.

Skipping school for him became more of a nuisance than it was worth. His case was not an exception. Students who had gotten used to barely getting by or passed through the grade levels due to age or social promotion were academically successful. Most importantly, they understood that their teachers cared about their success, and they recognized that failure was not an option. They became empowered and proud of the success they achieved.

We had data to prove that the SLC was a success. Discipline referrals and suspensions decreased, grade point averages increased, and absences and tardies were significantly lower when compared to 9th graders from previous years, who had not participated in the SLC. During lunch, between classes, and before and after school, I overheard teachers who were previously unaccustomed to collaboration talk about lesson plans, cross-curricular activities, and breakthroughs with students. There was a palpable excitement flowing through the 9th grade part of campus. Teachers who, in the past had resisted teaching 9th graders, expressed interest in joining the SLC. And our SLC model was spreading. Teachers of 10th, 11th, and 12th graders began to meet to discuss implementing SLCs at the higher-grade levels. Word of our success spread to schools around the state and beyond. We regularly had teachers, guidance counselors, and administrators from other schools tour our SLC, hoping to implement something similar at their schools.

After 2 years of SLC success, my principal told me about the plans to disband the 9th grade SLC, which would be replaced by a new district initiative. I was saddened and expressed my disappointment. I could not understand why the district would force us to abandon an initiative that was unarguably successful for students. My principal, who would retire the next year and who I respected immensely, gave me this advice: “You’re too young to be resistant to change. Education is all about change. You might as well get used to it.” At that time, I believed that my principal was right: education is all about change. However, I did not realize that her words were disempowering. Now I wish I would have fought to keep our SLC intact.

Analyzing Our Narratives

We (Lindsayanne and Hilarie) joined the writing group because we were intrigued with the idea of teacher leadership and wanted to learn more. We imagined doing literature reviews and learning what others had to say. But when we met, Marilyn asked us to think about our own examples of teacher leadership. We dutifully wrote some stories about things we had done as teachers, but we were reticent to call them examples of leadership.

Before beginning our work on this chapter, neither of us (Lindsayanne and Hilarie) thought of ourselves as teacher leaders. We were doing “teacher jobs”—either a job created on our own because we saw a need (Lindsayanne) or a job we accepted when asked to do so by an administrator (Hilarie). We were doing what good teachers do—they take on additional work to make schools a better place for teachers and students.

Ongoing dialogue in a supportive group often challenges old ideas as well as provides new options. This is what happened to us. Eventually we came to see our narratives first as stories of leadership and then as stories of leadership for social justice.

Narrative researchers have tools at their disposal if their desire is to address issues of social justice. As Chase (2011) points out "some [researchers] study how narratives make change happen and some collect and present narratives to make change happen. In either case, there is a sense of urgency, of the need for personal and social change" (p. 427). In both of our narratives, we were exploring what we were urgent to change. Writing narratives about our leadership initiatives led us to consider issues of social justice. Lindsayanne's narrative reflected urgency for social change in several ways: the urgency of speaking, the urgency of being heard, the urgency of collective stories, and the urgency of public dialogue. Hilarie felt urgent to address the discrimination and negative attitudes toward the ninth graders in her school. When narrative inquiry focuses on personal or social change, the relation between narrator and audience becomes central (Chase, 2011) and affords avenues for dialogue about social justice.

As we wrote and rewrote our narratives within a dialogue about social justice issues, we re-storied our teacher leader narratives.

On the Way to Transformative Leadership

In the literature we (the authors) read together, we found some categories about leadership that were helpful to thinking about Lindsayanne and Hilarie's leadership as we together explored issues of social justice. These categories challenged us (Lindsayanne and Hilarie) to rethink our narratives. We debated how to fit our experiences into these categories and we changed our minds back and forth in the process. The categories themselves became tools for dialogue and helped us uncover ways in which our teacher leadership roles included social justice and ways in which our leadership might have been extended toward more social justice opportunities.

In Shield's (2010) article, "Transformative Leadership: Working for Equity in Diverse Contexts," she defines these categories in this way: *Transactional* leadership focuses on reciprocation or the exchange of goods or services. This may mean accepting a leadership role because of the promise of extra pay. *Transformational* leadership "focuses on improving organizational qualities, dimensions, and effectiveness" (p. 564). End values and results are key motivators in transformational leadership. *Transformative* leadership "begins with questions of justice and democracy" and "critiques inequitable practices and offers the promise not only of greater individual achievement, but of a better life lived in common with others" (p. 559). Shield proposes that transformative leadership holds the most promise for social justice leadership.

Reflection on Our Narratives and Social Justice

Initially, we (Lindsayanne and Hilarie) were unaware of the idea of leadership for social justice. This was not how we framed our initial teaching stories and the language of "social justice" was unfamiliar to us. However, sharing our stories within a nurturing and critical dialogue helped us to see ways that issues of injustice, previously invisible, were deeply embedded in our experiences as teachers.

Lindsayanne's Reflection

I never thought of my initiation of a teacher-mentoring program as an example of teacher leadership for social justice. Because of my difficult first year of teaching, I was simply doing what I thought was right to support the new teachers at my Tennessee school. I felt that the new teachers in Tennessee needed to be on a level playing field with new teachers in other states that provided mandatory mentoring and induction services. It was my moral obligation to support these beginning teachers, since I was so well supported my first year. It wasn't until the dialogue in our writing group that I realized that I had been a teacher leader for social justice.

My Tennessee school was an ideal place to begin a mentoring program. Thankfully, when I approached my principal and the veteran teachers, they were supportive. While I am quite proud of my school-wide mentoring program, I wonder now why my efforts ceased at the school level. What stopped me from pursuing this program at the district level? At the state level? At the time, it never crossed my mind. If I had, this would have been one of the differences between transformational leadership and transformative leadership. In order to consider my leadership as *transformative* using Shield's definition, change would have to occur on a larger scale. I would have needed to think beyond my immediate context to consider beginning teachers more broadly.

Hilarie's Reflection

The most profound realization I had during our dialogue was when one of our dialogue group members suggested that my principal's statement that I should "face the fact that education is all about change" was disempowering. As a young, novice teacher, I took my principal's words to heart without question. Until writing my narrative, I had not thought much about that conversation with my principal.

Nearly 10 years have passed since the disbandment of the SLC, and since then I have completed a master's degree and I'm nearing the end of my doctoral program. These experiences, coupled with new knowledge and the process of dialogue and writing about this example, have led me to think about how I might have handled the conversation with my principal differently. My emerging understanding of teacher leadership for social justice gives me insights into how I might have moved many aspects of my SLC leadership endeavor from the transactional and transformational categories to the transformative category.

To consider my leadership as transformative, change would have to occur on a larger scale. Given that the SLC only lasted 2 years, widespread change was impossible; thus, my first step would have been to work to keep the SLC intact within my school. When my principal told me that our SLC was disbanded, I should have collaborated with my colleagues and SLC leaders from the other district high schools, to pool our collective data to prove that the program was too valuable to abandon. I should have taken our data to the district level. I should have presented it to the school board. I like to think that such advocacy would have extended the life of the SLC.

Over time, our SLC might have fostered societal change for the community in which I taught. Located in a poor neighborhood in which gang activity and crime were the highest in the city, high school dropout rates were a serious concern. Community meetings often centered on the young people, mostly males, who were jobless and turned to crime to fill their time and their pockets. Given the necessary time, I believe our SLC would have lowered our school's dropout rates, possibly leading to lower crime in the neighborhood. Additionally, the curriculum in our SLC focused on the needs of our at-risk students, and teachers worked hard to help them examine possibilities for their future. We invited college and career counselors to speak to the students, and the students researched career possibilities and set goals to help them achieve their career aspirations.

As an SLC, we worked to lower attrition but we also worked to help neighborhood kids see beyond limitations. We never ignored the circumstances from which they came; but we explored issues of poverty and crime through books and current events and we encouraged candid discussions about them. We were addressing social justice issues in the curriculum.

We had begun to see teachers of higher grades embrace the SLC concept. With more time and further SLC development, students might have felt supported and nurtured for all 4 years of high school, not just in 9th grade. While the SLC leaders felt good about the impact we saw, our impact was greatly hampered by the program's short duration.

Through dialogue with my coauthors, I better understand and can articulate my leadership style and the role I played in the creation of the SLC. More challenging, however, is reflecting on what I could have done differently to shift from mostly a transformational leader to a transformative leader. I did not have the knowledge or experience to truly be a teacher leader for social justice then, but I believe that I have the capacity to do so now.

Narrative Epilogue

As a dialogue group, we learned through the process of developing these narrative examples. We use this experience to make recommendations for teacher leadership for social justice.

The narratives here became stories of teacher leadership as we reframed them in light of new ideas and frameworks that called into question our previous interpretations. As we read different ideas about leadership and social justice, we were presented with varied possibilities for re-storying. Some of the questions were more uncomfortable than others. A trusting group and dialogue, which challenged but did not threaten, supported us in these struggles. We (Lindsayanne and Hilarie) couldn't change what happened in the past, but we have talked a lot about how things might have gone differently if we'd had an orientation toward teacher leadership for social justice. No one ever talked this way in our schools so these ideas were not available to us.

All four of us have been teachers in elementary and secondary schools. As we talked about teacher leadership, we were situated as teachers, a vantage point quite different from that of principals. All of us had principals ask us to do things during our careers, usually on a voluntary basis, that is, without released time to compensate for the work. The projects described in our narratives all took significant volunteer hours. Although Hilarie got a "stipend," it in no way compensated for the extra time she spent.

We've all had positive experiences as teachers working on projects and reform initiatives of one kind or another. Our leadership positions presented us with choices, both whether to participate and how to proceed. We could easily have chosen otherwise and our lives would have been less busy, yet the autonomy we had as leaders in these initiatives supported our professional development. The autonomy we experienced, as research has shown (Ingersoll, 2001; Renzulli, Macpherson Parrott, & Beattie, 2011), also led to increased job satisfaction.

While we didn't think of our actions as related to social justice per se, we uncovered ways in which our leadership experiences were motivated by injustices. Based on our own teaching experiences, we think teachers are often concerned about the injustices they see in their classrooms and schools but do not have the language of social justice to think about them and/or the support to deal with them. Leadership "opportunities" may often be related to issues of social justice that teachers do not understand in this way. Making this explicit through re-storying might help teachers, as it helped us, to see ways to address issues of social justice.

Through our dialogue and writing of these narratives, we have gained a new set of categories and language to support an increased sense of advocacy and vision. This happened because we had an open and challenging dialogue about our leadership experiences. Reading about social justice presented a new set of ideas against which we examined our narratives. Lindsayanne responded to the virtual abandonment of new teachers as they were left to survive their first year of teaching on their own, and Hilarie saw injustice in the attitudes and treatment of the 9th graders. We unearthed these embedded injustices as we narrated and interrogated our experiences through our group dialogue.

As authors we acknowledge that some of what we are discussing runs contrary to school norms in general and we wonder how often teacher leadership for social justice would really be possible. Schools are often weary of controversy and differences of opinion, yet dialogue is all about confronting differences in order to learn.

Furthermore, many principals are not all that happy with teacher leadership because it makes running the school more complicated and less easily managed in traditional ways. Lindsayanne and Hilarie's principals were happy to have them do extra work, but we're not clear whether they would have been happy if they had pushed for a mentoring program that would have required more resources and work on the principal's part (Lindsayanne's case) or raised the moral issues related to the arbitrary cancellation of a successful school project (Hilarie's case).

Our Recommendations for Supporting Teacher Leadership for Social Justice

We would like to make the following recommendations for developing teacher leadership for social justice:

1. Gather teachers together who are willing to talk honestly about their classrooms and experiences. Encourage teachers to share their stories. Honor each other's narratives as a way to open up a dialogue about the challenges and issues you see around you and your response to them. Share stories about when have you taken action to solve a problem or address an issue.
2. Explicitly talk about dialogue, what it takes and how to talk in ways that bring different perspectives to the table. In the beginning, it doesn't need to be a large group; it *does* need to be a place where differences are respected. Remember that this is a time for critique, not polite conversation. In addition to sharing your narratives, read about dialogue, and discuss its norms and possibilities.
3. Use your narrative sharing, what Connelly and Clandinin call "narrative inquiry," to think about yourself as a teacher leader. Where can you take the initiative to make changes, even small changes? What are changes that require more collective and assertive efforts? Where can you get support from others? Invite each other to narrate your experiences around issues and injustices you care about.
4. Share and write narratives about the "jobs" you have been asked to do, about the things you wished had happened that didn't, about how your experiences led you to consider some issues as more important than others, or about injustices you wished you'd addressed but didn't. The category of "jobs" typically leads to examples of teacher leadership, even if you don't initially think about them this way.

   Related to this, you might talk about the typical expectation that teachers should *work hard* but *resist little*, and/or the expectation that teachers should "do what they are told" rather than make informed professional decisions. The point is not to create a revolution nor be disruptive; the point is that there are many inequities in schools and teachers both know what they are and are well positioned to advocate for change. Yet we often don't consider this as a possibility. Talking about these possibilities in a group provides direction and support.

5. As you gather together more and more stories of teacher leadership, consider these in light of the categories of leadership we used earlier (transactional, transformational, and transformative, Shields, 2010). What categories would your experiences fit into? In what ways could you extend what you are doing to include addressing inequities in your classroom, school, and/or district?

The steps we recommend here mirror our experience in narrative dialogue that promoted new understandings of ourselves as teacher leaders for social justice. If we (Lindsayanne and Hilarie) had carried our present understandings about leadership with us during our previous work, we would have taken on stronger advocacy roles as leaders. It took dialogue and re-storying our narratives to even realize that we had been *teacher leaders* and, further, teacher leaders *for social justice.*

This was not something we (Lindsayanne and Hilarie) would have likely come to on our own, and our recommendations here reflect how narrative dialogue promoted this reimaging of ourselves as leaders for social justice. Most of us know well how teachers are isolated in their classrooms with few opportunities for serious dialogue about social injustices in schools. Moreover, teachers often lack the models or concepts that would support developing our abilities to be teacher leaders for social justice. It is also difficult to be a teacher leader, especially a teacher leader for social justice, if principal support is lacking.

We found three things important to our (the authors') growth (a) dialogue within a trusting and ongoing group, (b) Shield's categories of leadership, and (c) narrative inquiry. These became tools for understanding our past experiences more deeply and seeing opportunities for leadership for social justice in those experiences. We offer these suggestions as a means to promote teacher leadership for social justice in schools.

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Chapter 26

Re-conceptualising Teacher Leadership Through Curriculum Inquiry in Pursuit of Social Justice: Case Study from the Canadian Context

Ann E. Lopez

> Good teachers have always known how to be educationally subversive. They have refused to underestimate their own sense of agency and have been able to perceive the scope for radical change within their own classroom and within their own schools. They refuse to collude with the victim mentality that relinquishes initiative, self-belief and a sense of urgency (Galton & MacBeath, 2008).

The changing demographics and social realities in schools have precipitated calls for social justice education and have garnered the attention of educational leaders, researchers and school-based scholars.[1] Demands from communities and parents that schools become more responsive to the needs of the students who have traditionally been underserved have placed social justice leadership at the centre of debates on school improvement. Despite these calls, there still remains a lack of consensus among educational leaders on what defines social justice. Shoho, Merchant, and Lugg (2005) suggest that social justice is a politically loaded and elusive construct. Bogotch (2002, 2005) maintains that social justice has no fixed or predictable meanings, while scholars such as Dantley and Tillman (2006), Marshall and Olivia (2006), and Furman and Gruenewald (2004) urge those engaging in conversations about social justice to seek to identify some shared understandings. While not offering a definition of social justice, I would argue that social justice in schools is all about students seeing themselves in the curriculum being taught and having teachers who include and value the knowledge of students and their communities and school leaders who create an environment where injustices and practices that marginalise some students and privilege others can be challenged and disrupted. Notwithstanding the ongoing debate, recognising that social injustice cannot go unchallenged, educators in pursuit of improved educational outcomes

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have advanced social justice as a worthwhile educational goal for diversified, minoritised and traditionally underserved students (Aboriginal students, students of colour, students from lower-income groups, immigrants and students whose first language is not English, among others).

This chapter emanates from my own questioning and reflection on what leadership for social justice might look like in classrooms and teacher leadership in particular. It locates the conversation on social justice leadership and teacher leadership within the context of teachers' curriculum work in their classrooms and seeks to make explicit links between social justice, teacher leadership and curriculum inquiry. As Galton and Macbeath (2008) argue in the quote above, teachers have refused to underestimate their own sense of agency and the scope for radical change in their classrooms. I was challenged to think differently by an important question posed by Bogotch (personal communication, October 19, 2011) who asked in his response to earlier drafts of this chapter 'When curriculum is taken from local educators then there cannot be teacher leadership, or can there be'? This question opened up new ways of thinking for me as I reflected on teacher leadership and how it might be conceptualised differently, within a framework of curriculum inquiry located in the work of teachers in their classrooms as they pursue improved educational outcomes for students, particularly those who have been traditionally underserved. I see this pursuit as social justice. The chapter builds on my previous work and research and draws on previous publications of some of the findings in Rolheiser, Evans, and Gambhir (2011) and Lopez (2011a, 2011b). Utilising a case study approach, I theorise an alternative framework for teacher leadership at the intersection of social justice and curriculum inquiry that highlights activist bottom-up leadership. It starts with a review of the literature on curriculum inquiry; I then share some of the social and political realities of education within the Canadian context. Next, I situate my arguments and analysis within one teacher's activism and agency (Audrey[2]), in her classroom as an example of the kind of teacher leadership that I advocate. Lastly, I discuss Audrey's activism, agency and teacher leadership that I advocate and its implications for curriculum inquiry and social justice (Ladson-Billings, 1995a, 1995b). By examining one teacher's choices and actions around curriculum, it is the hope that we can begin to understand how teachers construct new epistemologies grounded in the experiences of their students who come from diverse communities and what we can learn that might inform school improvement plans and ways in which schools are organised. In looking at this kind of inquiry within the Canadian context, I draw on the work of Cynthia Chambers, Ted Aoki and other Canadian curriculum theorists that have examined alternative forms of knowledge in pursuit of more just schooling. Chambers (2003) suggested that curriculum is inherently political and curriculum in Canada through texts and practices reinforces the 'normative definitions of gender, sexuality…as well as racial categories, stereotypes and class distinctions in the society at large…thus Canadian curriculum has a great deal with in common with curriculum internationally' (p. 223). It is for these reasons that curriculum must be seen as an engine for change in challenging hegemonic practices and reducing injustices in schools.

Importance of Teacher Leadership Within Educational Leadership Discourse

Much of the research on educational leadership has focused on the role of principals and school administration with little emphasis on teacher leadership. According to York-Barr and Dyke (2004) and Murphy (2005), research on the leadership work of teachers in their classrooms within educational leadership requires greater attention as efforts to highlight teacher leadership within educational organisational systems have not gained much success despite teachers' importance to school reform and school improvement. Educational scholars such as Fullan (1993) and Ornstein and Hunkins (2004) have argued that limited engagement of teachers in meaningful decision-making has been a major flaw in educational reform efforts.

Like social justice, leadership remains a seductive and elusive concept (Leo & Barton, 2006) and continues to be contested and researched. Within these discourses and contestations, teacher leadership is even less defined. Harris (2005) has found that there are conflicting and competing definitions of teacher leadership. In the school leadership literature, conceptions of teacher leadership vary from support for principals and mentors to other teachers (Moir & Bloom, 2003), taking on middle management positions (Gronn, 2000), and instructional leaders focusing on pedagogy (Blase & Blase, 2000). While it is generally perceived that teachers have an impact on student outcomes, the connection between teacher leadership and student outcomes has not been established in the research (Leithwood & Jantzi, 1999, 2000). Harris in a review of the literature on teacher leadership found that there are many advantages to teachers and schools in building and acknowledging teachers' leadership capacities but that the literature is not as convincing in the relationship between teacher leadership and student learning outcomes. According to Handler (2010) the literature provides little consideration of professional knowledge, specifically knowledge of curriculum theory and critical pedagogy as an underlying reason for the failure of teachers to successfully fulfil meaningful leadership roles supportive of improved student outcomes. This aspect of teacher leadership I believe is critical as discourses on leadership broaden to include issues of social justice (Bogotch, 2002; Jean-Marie, Normore, & Brooks, 2009). I believe that teachers are integral to leadership and policy discourses on school improvement as they make curriculum and pedagogical choices daily that impact greatly student outcomes. Young and Lopez (2005) advocate for broader leadership frameworks that include alternative theories and practices and disrupt taken-for-granted assumptions of what leadership is, what it can do and what purposes it serves.

How Might Curriculum Inquiry Inform Teacher Leadership?

Schwab (1983) suggested in his seminal piece that educators focus on the practical and suggested that teachers play a significant role in curricula decision-making given their roles as implementers of curriculum and their understanding of students in their classrooms. The implementation of large-scale curriculum and the impact of policymakers in the development of curriculum that is forced on teachers and learners were of concern to Schwab (Kitchen & Parker, 2011). Curriculum theorists such as Maxine Greene, William Pinar, William Schubert, Gloria Ladson-Billings, Ted Aoki and others have helped educational leaders, researchers and school-based scholars to understand the sociocultural and hegemonic power that schools hold in the organisation of society, which has implications for those pursuing social justice leadership. Clandinin and Connelly (1992) built on Schwab's ideas of seeing teachers as curriculum makers actively working alongside their students and suggested that teachers should be empowered to be curriculum makers to enhance the learning of students (Craig, 2011). In other words, discourses on teacher leadership should include curriculum development and inquiry. This type of teacher leadership however runs counter to the current ethos of standardisation, teacher testing and performance for pay that is slowly defining the role and work of teachers in the United States and elsewhere. Goodwin (2012) suggests that teacher education programmes and educational policymakers in general across the globe are borrowing bankrupt ideas from one another and this is cause for concern.

Schwab (1972) in arguing for the practical in curriculum suggested that, 'it is a discipline concerned with choice and action' (p. 4). Teachers' choices and actions impact the daily lives of students, which I consider to be fundamental to social justice praxis. Good curriculum work is democratic curriculum-based pedagogy. Teachers engage in good curriculum work when they examine multiple modes of curriculum inquiry and commit themselves to ethical fidelity and practical artistry that link curriculum inquiry to classroom practices (Schubert, 2009). I interpret this to mean how the curriculum is used to challenge what is posited as knowledge and the pedagogical approach of teachers. Curriculum inquiry and decision-making takes place when environments are created where teachers, students and parents or community members are able to question the underlying assumptions of circulating discourses about curriculum and mobilise their own agency (Ylimaki, 2011). Curriculum deliberations are complicated discussions requiring balanced attention to students, subject matter, the milieu and teachers (McCutcheon, 1995). This comprehensive approach to curriculum decision-making I believe constructs teachers as leaders in their classrooms. Scholars and practitioners alike are 'curriculum workers' who must take leadership in providing informed alterations to the 'curriculum of scarcity' exemplified by the current discourses on standardisation in education and the one-size-fits-all approach (Pinar, 2007). In supporting this notion, Reyes-Guerra and Bogotch (2012) argue that teacher leaders and others engage in curriculum inquiry that seek to build curriculum knowledge, based on learners' local communities and societal needs, and exit the 'canned' curricula and established canons. They also argue for repositioning curriculum inquiry within educational leadership discourses. Teachers can no longer be bystanders in the current climate that measures achievement not on the development of the whole child to function in a democracy, but prescribed outcomes measured by various standardised tests, and curriculum decisions that are taken out of the hands of teachers.

Curriculum is ‘complicated conversation’ made even more complicated by the present social realties in schools (Pinar, 2005). Critical transformative leadership (Shields, 2010) that I assert in this chapter is not about business as usual; it is working for social change and social justice (Ayers, Hunt, & Quinn, 1998; Cochran-Smith, 1998). If social justice is to be more than an organising concept, action is required which is the essence of praxis as argued by Friere (1970). This type of transformative leadership based on dialogue and strong relationships can provide opportunities for all children to learn in school communities that are socially just and deeply democratic (Shields, 2003, 2004). I suggest that choice and action around curriculum are central to teacher leadership, but discourses on teacher leadership have not explicitly made this connection. Pinar (2007) urges that we engage in *internationalisation* and take the opportunity to become engaged with each other to sustain the work and reconstruct through curriculum as we advance values of peace, ecological sustainability and social justice. Pinar’s call for *internationalisation* has great significance for me as an educator who lives and works in Canada, one of the most diverse countries in the Western world where equity education is at the forefront of the educational discourse. Ryan (2010a, 2010b) and Ryan and Rottman (2007) advocate that equity-minded educators find ways to make their schools and communities better places to work and live and employ political skills to better understand how those who advocate social justice principles can accomplish their goals. I extend the notion of equity-minded educators to equity-lived educators who not only employ political skills but model agency and critical praxis in their classrooms and schools. It is important as we advance new philosophies on ways to better meet the needs of an ever-growing diverse student population that we learn from varying contexts. Below I share examples from the Canadian context, specifically Southern Ontario, which is home to one of the largest diverse populations in Canada, in the hopes of what we might learn to add to our body of knowledge on ways to better serve the needs of diverse students across the globe. As population shifts in search of better lives, more and more countries are becoming increasingly more diverse racially, ethnically, religiously and linguistically.

The Canadian Schooling Context

Classrooms in Canada today reflect the globalised nature of society within a context of immigration and globalisation, where students’ identities are transnational, emerging and rooted both inside and outside Canada. Many students while not immigrants themselves come from immigrant communities that reflect various races, languages, cultures and religions. The Canadian social landscape has changed with immigration and demographic shifts. By 2031 between 29 and 32 % of Canada’s population could be members of a ‘visible minority’[3] (Statistics Canada 2010). What does this mean for teachers and how do they respond? What kind of activist, equity-lived teacher leadership is necessary to act and how? Within this social and political reality, how do teachers weave and advance curriculum that addresses the needs of diverse learners? Canada is a diverse country of provinces and territories; as such I am not positioning this work as reflective of all of Canada, but located within the Southern Ontario context. Southern Ontario includes the city of Toronto and the Greater Toronto area (suburbs that surround Toronto) that have seen its population transformed with the influx of a large number of immigrants from every corner of the globe.

Canada is known for its official multiculturalism[4] policy and diversity of the population; however, there still exist homelessness and poverty, particularly among the Aboriginal, racialised and low-income populations, and continued disengagement from the school system of racialised youths. Between 35 and 45 % of Black, Hispanic, Portuguese and Aboriginal students drop out of school before graduation (Toronto District School Board, 2010). Ontario's Ministry of Education (2009) was formulated to address some of these issues, but there is much work to be done. The strategy recognises that 'while Canadians embrace multiculturalism, human rights and diversity as fundamental values, there is ongoing discrimination in society that requires attention…Ontario is Canada's most diverse province and must find solutions to these concerns' (p. 1). Ontario cannot afford for its economic development and economic prosperity not to address these concerns. The growth of the immigrant and visible minority groups has shifted the makeup of Ontario's large urban centres, and research has shown that immigrants face significant income disparities and have the highest proportion of unemployment (Ontario Trillium Foundation 2009/2010). Addressing issues of exclusion, marginalisation, disengagement and 'push-out' in Ontario's school system will assist in the process reducing current disparities faced by immigrant and racialised groups.

Within the Canadian and Ontario context, it is imperative that we ask how curricula and bottom-up activist teacher leadership can be at the forefront in carving out new experiences for our students. In this regard, Aoki (1990), Hunsberger (1989), and Sumara (1996) call for distinction to be made between 'curriculum as lived' and 'curriculum as planned' and invite teachers to centre experiences that students bring to the classroom in interpreting the curriculum that is given and find new ways to engage. They conceive of curriculum as an interaction between teacher and student, questioning texts, pedagogies and voices that are included and excluded.

In the case study below, I analyse the curriculum choices Audrey made in her grade nine applied[5] English class in a secondary school in Southern Ontario to disrupt the Eurocentric curricula and bring the lived experiences of the diverse students in her class into the curriculum as well as build cross-cultural understanding. I examine how her curriculum choices might inform what we know about teacher leadership in pursuit of social justice. Through collaborative action research grounded in critical and culturally responsive teaching (Gay, 2000; Ladson-Billings, 1995a, 1995b), Audrey disrupted the 'given curriculum' in her English class, challenged the 'canons' and engaged in Freiran problem-posing pedagogy to advance a social justice educational agenda in her classroom. Through the use of a culturally relevant text, Audrey engaged in a form of activist bottom-up leadership that challenged the existing norms and ways of teaching the English curriculum in her grade nine applied English class at Greenville Secondary School.

The Case of Audrey as Curriculum Worker and Teacher Leader

Audrey is an African Canadian teacher with over 20 years of teaching experience in the Caribbean[6] and Canada. She used her experiences as an immigrant to theorise on ways that the English curriculum was being delivered and taught at Greenville Secondary School. Greenville Secondary School is located in the very diverse community of Ridgeton in Southern Ontario home to a large immigrant population that is ethnically, racially, religiously and linguistically diverse. Ridgeton over the years has transformed demographically and has a large and growing and South Asian population. It is predominantly a lower- to middle-income community. The community's diversity reflects the demographic shifts occurring in Southern Ontario with large populations of immigrants and minoritised people.

Data were collected through classroom observations, interviews, inquiry groups and reflection journals over the course of 1 year from two grade nine applied English classes. Two semi-structured face-to-face interviews were conducted (Creswell, 2003) that allowed for the elaboration and the construction of meaning. The interview at the start of the study gathered information on Audrey's understanding of culturally responsive and critical teaching. The interview conducted at the end of the study focused on the impact and effectiveness of culturally responsive and critical teaching strategies, tensions and challenges and the impact of the study on her professional learning. Critical teaching strategies included the examination of texts for voices that are excluded, supporting students to examine societal issues that continue to privilege some groups and marginalise others, and ways that they can become involved in social action. Aoki (1993) suggests that when we examine curriculum, we start in the 'curricular landscapes of practicing teachers and their students' (p. 255). Below I describe and analyse Audrey's role as a teacher leader and her pursuit of social justice for her students through the interrogation of her grade nine English curriculum. The following questions guided the research:

1. How does culturally relevant curriculum and teaching through the use of alternative [culturally relevant] texts impact student learning, engagement and achievement in diverse English classrooms?
2. How do such practices inform teachers' professional learning?

Challenging the Canons and Asserting Student Voices

Canadian researchers Holloway and Greig (2011) noted that it is inconceivable that little, if any, work has examined how teachers choose texts within the Canadian context from a critical perspective, given the changing demographics in schools and at a time when educators, school officials and policymakers across North America are challenged to look for new ways to meet the needs of the growing diverse population. It is this glaring omission that prompted me as a school-based scholar and researcher to engage in collaborative action research with Audrey to explore the use of alternative, culturally relevant texts in the English curriculum grounded in the lived experiences of her students. The English department at Greenville Secondary School where Audrey taught as an English teacher for many years like many secondary schools in Ontario privileged the use of Shakespeare for novel study in the English curriculum. Audrey decided to break with tradition and choose for the novel study unit in her grade nine applied English classes a novel by Suzanne Fisher Staples, called S*habanu Daughter of the Wind* set in Pakistan, which narrates the experiences and struggles of a young South Asian girl as she moves into adulthood. The choice of the novel was significant as a large percentage of students in Audrey's class self identified as South Asians, either immigrants or second generation. Given the established tradition of using Shakespeare for the novel study unit, some students questioned Audrey about her choice of text and needed to know 'why we are not studying Shakespeare like the other classes'. Some teachers in the English department expressed uneasiness at Audrey's choice of text for the novel study. Audrey's choice was not an easy one and required bold activist action. She had the support of the head of the department and the tacit support of the principal. Audrey had to operate on many levels in this bold action of leadership and agency to disrupt the existing curriculum. She spent many hours planning to ensure that the expectations of the Ontario curriculum were met while at the same time offering her students this new experience. She had to create new activities, formative assessments and summative assessment.

Focusing on the needs of the community and her students, Audrey made changes to the English curriculum that foregrounded the knowledge of the community and students in the teaching of English. Morrell (2005) argues that critical English education must be explicit in disrupting existing power relations and develops in students the skills to deconstruct the canonical literature and media texts while allowing them to create their own critical texts. The Ontario English curriculum guideline, which many would say is a progressive one, recognises the importance of a critical approach to the English curriculum and urges teachers to engage in critical literacy that 'involves asking questions and challenging the status quo, and leads students to look at issues of power and justice in society' (Ontario Ministry of Education, 2007, p. 34). However, as Holloway and Greig (2011) point out, it is up to the teachers to take a leadership role in teaching a wider range of contemporary texts that enable students to move outside traditional boundaries and extend their intellectual opportunities.

Holloway and Greig (2011) found in a review of the research in Canada that there are no research studies that focus on English teachers' selection of literacy works in high school classrooms. This gap in the extant literature makes this effort worthwhile, and I agree with Holloway and Grieg's notion that it is interplay between teacher agency and the contexts of their work that will bring about real change. This kind of curriculum work requires teachers to see curriculum as operating within societal, political and cultural contexts, recognising that schools are political sites of cultural and social reproduction, where what is taught is as important as how it is taught and where there are constant contestations, tensions and struggles over curriculum and pedagogy (Giroux, 2002). Audrey in keeping with

Dewey's notion that experiences are central to the teaching and learning process presented her students with curriculum and pedagogy that shifted their thinking and co-constructed new knowledge. Aoki (1993) summed up the work of teachers as curriculum workers this way:

> …solving curriculum development problems [involves] …being engaged consciously or otherwise in the construction of meaningful human and social reality….simultaneously engaged in self-reflection as he [she] turns over in his [her] mind that he [she] is taking for granted in the way of cognitive interests, his [her] assumptions about the world and approached to that world. In such a reflective activity, we can see the possibility of the curriculum builder being conscious of …the program designed for students (p. 51).

Given the context of Greenville Secondary School, the community of the Ridgeton and the Ontario discourse on equity and diversity, teacher leadership in curriculum decision-making is not only warranted but also urgent. It is important to view curriculum as a tool to disrupt essentialising concepts of culture and ethnic identities (Sleeter, 2011) and challenge students to think critically. Essentialising culture means a fairly fixed and homogeneous conception of the culture of a minoritised group, with an assumption that students who are members of that group identify with that conception of who they are (Sleeter). Sleeter suggests also that it is important to recognise forms of oppression in discourses on culture; seeing the curriculum as a way of disrupting the status quo and what is posited as knowledge in the teaching of English, Audrey created activities that involved the students in examining and challenging stereotypes and worked with her students to develop critical perspectives.

Challenging Stereotypes

Audrey engaged in dialogue with her students to unpack and deconstruct stereotypes and assumptions in the media and other places about South Asian culture. The students in her class were ethnically, linguistically and religiously diverse (most of the students in the class identified as Black, South Asian and White). She utilised a problem-posing dialectic approach that as she describes it 'created space for students to reflect on and dialogue with each other about issues that they would otherwise ignore and just not bother to think deeply about'. Audrey started this dialogic conversation by asking the students to write down their responses to questions such as: What do you think the book is about? How would you describe the representation of South Asian culture in the media? Support your answer with examples where possible.

The students discussed their responses in pairs and then shared their responses with the class as a whole. At the end of each class and section, the students were asked to write down in their journals two pieces of new knowledge they had learned and again discuss in pairs, literature circles and the class as a whole. This exercise excavated some of the stereotypes the students held about South Asian culture and created a good opportunity for Audrey to deconstruct new knowledge with her students and learn from them. Audrey noted that this critical dialogue 'opened up spaces for conversations about stereotypes of other cultures in ways that did not essentialize, romanticize and othered'. Like all contested classroom spaces, there were moments of tension as the students tackled the difficult issues. One student wrote in his reflective journal at the start of the unit 'I do not see why this is necessary…why are we reading this book?' In conversations with the students one-on-one, in their small groups and with the class as a whole, Audrey talked with her students about the benefits of exploring multiple perspectives and valuing other forms of literacy knowledge as a way of learning about people who are different from them. She also engaged her students in conversations about the literary contributions of the 'canonical' texts while imploring them to look at other forms of writing that are not usually included as required readings in the English curriculum. This Audrey said 'moved the students to examine their thinking about knowledge that is valued and why that is important in a diverse society like Canada to have books like *Shabanu Daughter of the Wind* in the English curriculum'. During the discussion of the book and classroom activities, some of the South Asian students took on lead roles in teaching the class about their culture from their own lived experiences, drawing on their funds of knowledge (Gonzalez, Moll, & Amanti, 2005). Audrey noted, 'the leadership of the South Asian students in talking to other students about their culture and disrupting stereotypes was an eye-opener for me. They talked about how they felt and they ways in which they are represented in the media'.

By building an environment of inquiry that validated the students' experiences and relinquishing some of her authority in the classroom as the central figure with all knowledge, Audrey engaged in bottom-up curriculum making. When teachers act in pursuit of social justice, they relinquish some of their authority in the classroom in an effort to centre the experiences of students (Marshal & Gerstl-Pepin, 2005). Audrey tackled current conversations that were of relevance to the students, such as understanding the cultural practice of arranged marriages that did not reduce or essentialise the South Asian culture and disrupted stereotypes, misconceptions and misrepresentations some students held. This validated the knowledge and experiences of the South Asian students in the class who as Audrey described it 'felt safe given the environment of inquiry that was established to speak about their culture respectfully'. Sharma (2008) suggests that in discussing people of colour and particularly South Asian culture, teachers should avoid focusing the discussion on the traditional, religious and patriarchal, as these characteristics are not unique to what is labelled South Asian culture, but focus instead on how people of colour are represented. This was important not only to South Asian students who got the opportunity through the curriculum to speak about their culture, but it was important for Black students in the class who engaged in dialogue that disrupted negative and stereotypical representations of what it means to be Black and homogeneity of Black people as a group. White students in the class through the cross-cultural dialogues developed deeper understanding and knowledge about culture and for some began the journey of understanding that Whites do have a culture.

Developing Critical Perspectives

By *examining*, *critiquing* and *experimenting*, students critically engaged with the text and connections to their own lives and experiences. They examined the author's perspectives and viewpoints as a White woman writing about South Asian culture and highlighted areas of disagreement with the author. To ensure meaningful critiques by her students of the book, Audrey engaged in strategies to build her students' critical thinking skills. Audrey in her journal wrote 'it took time to reconstruct the curriculum in my applied English class as this is a level of critical thinking that some students are not exposed to in other applied classes'. Audrey spent time teaching the students how to examine texts from a critical perspective by asking questions such as: What was the dominant voice in the text? Were their voices missing? Could you relate to the text? Did anything bother you about the text? How would you change or re-write it? Students had to justify their answers. The students got very involved in discussing whether or not the author 'thoughtfully represented the South Asian culture and lifestyle'. Audrey felt that this alternative curriculum and way of teaching 'got the students involved in ways that they were not involved before… they became empowered and displayed the characteristics of empowered members of a community'.

The students wrote their thoughts about the book, reaction to classroom activities and dialogue, as well as relevant information for the completion of their summative assessment in their journals. Audrey felt that 'it was important for students to reflect on the process and write down their thoughts and feelings as it validates the students' learning'. For example, students were asked to reflect on 'new knowledge they had learned about another culture and how this changed their views of their classmates and the community'. Ladson-Billings (1995a, 1995b) asserts that students are capable of critical reflection and make meaning of their experiences when given the chance. One student wrote in her journal at the end of the novel study:

> At first I was not really interested in reading the book because I am also a Muslim girl and from Pakistan…. However I was pleased to see other students in my class that were not from the same religion or country research and get more information about it…. I hope that the school continues to do this but not just with Islam and Pakistani, but also with other religions and countries around the world, so everyone gets to see how different things and people are around the world (Sumaya).

Another student said that at first she felt uncomfortable talking about cultures that she was not familiar with, but as she read the novel, she grew to understand more about it:

> I really did not like the idea of not doing Shakespeare in my English class. All the other classes were doing Shakespeare and my mom wanted to know why my class was not reading it. I really was not happy, but as I read more about Shabanu I connected with her life as a teenager and got to understand their culture a little better. I even shared the story with my mom.

This was the first time that Audrey had not used Shakespeare for the novel study in her grade nine applied English class and she felt that it was important as she noted to 'reflect on what I have learned about my teaching, the curriculum, my students and my own professional journey as a teacher'. Audrey mentioned that it was important to examine curriculum choices as a means of disrupting what she describes as the 'formal curriculum' and what Aoki (1993) referred to as 'curriculum as planned'. Audrey reflected:

> I had to document possible ways to disrupt the formal curricula while at the same time meeting expectations of the official curriculum. It is important for students to be able to identify the literary elements in a novel and make connections to the curriculum expectations as given by the Ministry of Education. This is also important for me as I continue this work and include culturally relevant text in my English curriculum.

In the English curriculum 'canons' have traditionally been elevated to positions of importance that both teachers and students have difficulties disrupting. They hold positions and value in our education and lives that everyone believes students and teachers should know and revere (Nicol, 2008). Audrey's work indicates ways that teachers can and must find space in the given curriculum to challenge existing norms and requires a kind of bottom-up activist teacher leadership that this chapter articulates. Audrey said she felt 'empowered' by the work she was doing and 'felt embolden to take steps in examining the power relations in schools more closely and how some students continue to be marginalized':

> The more I think about this research the more I think about power relations in institutions such as schools and how intimidated some kids are by the dominant culture and the materials and books being used. It is important to understand that some students cannot function in classrooms as they are set up and negotiate the teacher's power and authority…. Some students are sometimes intimidated by the dominant culture of the teacher….

While research suggests limited connections between teacher leadership and student achievement and outcomes (Leithwood & Jantzi, 2000), Audrey noted from the examination of the summative assessments given in her class that 'the students' overall grades improved, they were more engaged and there were no failures'. Audrey felt that this was achieved 'because the curriculum and pedagogy connected to the students' lives'. This has prompted me to question if researchers are looking for large-scale systems connections between teacher leadership and student achievement, it might reside instead in the classrooms of individual teachers and the commonsensical approach to curriculum decision-making? Audrey noted:

> The research proved what I believed instinctively and knew intuitively about connecting with the lives, interests and cultures of the students to the curriculum. My reason for participating in the research is my frustration with the curriculum. It is not connecting with the students and cause classroom management issues. The books they are forced to read are always left lying around in the classroom…. When they see themselves in the curriculum the students are more engaged and produce higher quality work.

Audrey also saw improvements among the emerging learners in her classroom who needed literacy support. They became 'interested in the context of the book, asked more questions, gained confidence in sharing their ideas and overall produced higher quality work'. The students in their feedback said that they felt valued because they were given the opportunity to learn about their culture and the culture of others. Audrey suggested that:

> The students' interest in the cultural context of the book was reflected in their overall achievement in the course. Their work reflected a keen understanding of the elements of literature, as they were able to use their imagination to create literary pieces that reflected a different culture. They asked more questions in class and were more eager to volunteer answers. Their grades improved overall, and all the students passed the course, achieving levels 3 and 4. Most significantly, the striving students produced a higher calibre of work than they normally produced. The students became more empowered and showed greater participation and interest… they felt valued as they shared knowledge of their culture and were able to clarify issues for students where there were misconceptions and became resource persons throughout the study of the unit. For students who were not South Asian a new set of knowledge was created and they were eager to learn about other cultures.

In one of my classroom observations I saw students in literature circles engaging in discussions on various topics and issues relating to the novel. As I moved around the various groups I noticed that the students were engaged, talking back and forth and having fun. We sometimes forget that fun is an important aspect of students' learning. During another classroom observation, Audrey invited a former South Asian student of hers who was still a student at the school as a guest speaker to her class to speak about 'what it is like growing up South Asian in Canada'. In an effort to bring the voice of the community into the curriculum, parents were also invited as guest speakers. A South Asian parent commented during a parent/teacher interview on how 'happy' she was to 'see such a book being used'. 'I am happy to see such a book being used, it is the first time. I am very happy'. The English curriculum remains dominated by texts that are about the lives of dead White male authors (Holloway & Greig, 2011) and there is the need for change. This change can happen if teachers exert leadership and agency in curriculum choices and development.

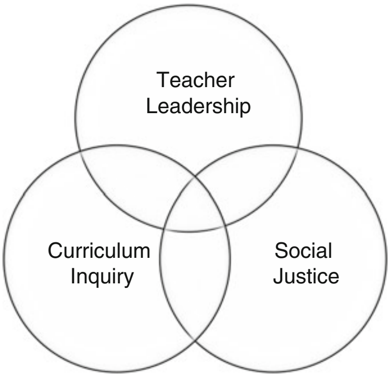
Rupturing the Situatedness of Curriculum Inquiry and Planning Outside of Teachers' Work in Classrooms

Ylimaki (2011) posits that 'familiar curriculum leadership processes such as teacher supervision and textbook selection are difficult to examine because they are inherently commonsensical and contextual' (p. 196), which prompts us to ask; has educational leadership and social justice discourses overlooked the obvious and commonsensical? The metanarratives of traditional curriculum delegitimise the discourses of the lived experiences of students that are central to the stories told and the language spoken (Aoki, 1993). Curriculum becomes the site on which generations struggle to define themselves and the world (Ylimaki, 2012). Aoki suggested that traditional curriculum discourses be decentred to make room for the practical wisdom of teachers' everyday experiences with their students in the classroom. The problematic nature of power relations in schools makes critical teacher leadership and working for social justice through alternative culturally relevant texts challenging at times. It requires navigating spaces with entrenched norms and contesting the given curriculum. The hope is that by examining teachers' leadership role in developing curricula in their classrooms, school-based scholars, researchers and those invested in education might learn something that will assist in re-conceptualising teacher leadership and see teachers as curriculum leaders. Given current sociocultural and political contexts of schools and the need to respond to the diversity represented in classrooms today, curriculum leadership requires that teachers have the ability to recognise the need for the best design and implementation of techniques of a broad range of instructional approaches (Handler, 2010). Unlike Handler, however, I contend that decisions around assessments, choice of texts and lesson design represent curriculum decision-making choices by teachers and are not merely lesson decision-making strategies. I agree with Ylimaki (2011) who posits curriculum leadership as 'individual and collective influence on cultural politics as well as the content and pedagogy of education – what is taught, how it is taught, and to whom' (preface). By examining teacher leadership within a framework of curriculum inquiry, we might better understand how to create schools that provide education that advances all children and prepares leaders who have a deep understanding of curriculum in relation to broader cultural politics. Teachers who are engaged curriculum leaders use their understanding of curriculum theory and inquiry to develop culturally relevant, authentic and rigorous curricula that contribute to holistic achievement on various kinds of assessments (Ylimaki).

Jean-Marie, Normore, and Brooks (2009) argue for social justice leadership that extends to inquiry born in other disciplines. The idea that curriculum inquiry can be a vehicle for change is not new, as curriculum theorists have led a path of inquiry, research and scholarship. This work brings together what Henderson and Gornik (2007) see as deliberative artistry in curriculum decision-making that combines designing, planning, teaching, evaluating and organising decisions. It points to teacher agency and leadership in the face of systemic and structural barriers in the advancement of a progressive curriculum that reflects the lives of students and their interests. For too long teacher leadership discourse has been around assuming more managerial roles in schools and taking on middle level management responsibilities. In this chapter I have repositioned teacher leadership at the intersection of social justice and curriculum inquiry acted on teachers' classrooms (Fig. 26.1).

This model represents my conception of teacher leadership and social justice anchored in the curriculum work on teachers' classrooms. The overlapping circles represent the interconnectedness and intersection of teacher leadership, curriculum inquiry and social justice and indicate that all three are necessary to create and bring about changes for students. These three constructs come together as teacher leadership represents the agency of teachers to disrupt existing norms and as social justice represents the pursuit of more equitable schooling, moving away from what I refer to as laminated equity and policies. These constructs are informed by and implemented through curriculum as inquiry enacted in classrooms as 'curriculum as lived', not as 'planned' or 'scripted'. Students and communities occupy the overlapping areas as all three constructs affect them as we seek to implement social change, remove injustices and improve the lives and experiences of students. Pinar (2004), in looking back at Ted Aoki's work, one of Canada's foremost scholars on curriculum

Fig. 26.1 Teacher leadership social justice: An alternative approach



inquiry, noted that Aoki urged teachers to be reflective and see curriculum as a form of praxis. For a long time school administrators and those who advocate systems reform have predicated change and improvement on change from the top-down with buy-in from teachers who assume various responsibilities in distributed leadership models but rarely articulated through curriculum change initiated in classrooms by teachers. Audrey's bold actions as an activist teacher leader and curriculum worker might help us to understand teacher leadership for social justice not only in terms of pedagogy but in the choice of curriculum.

The demographic shifts in Canada and elsewhere call for curricula that are reflective of more diverse cultures and views, one that is inherently created from the bottom-up. Teachers have a great role to play in advancing this agenda through research and practice. Chambers (2003) contends that curriculum scholars in Canada are like the many immigrants to Canada who must find ways of placing their knowledge within the discourses, within a nation that continues to search for its own identity. She suggests that many Canadian curriculum scholars are 'braiding languages and traditions, stories and fragments, desires and repulsions, arguments and conversations, tradition and change, hyphens and slashes, mind and body, …texts and images, local and global…into something that is perhaps as Canadian under the circumstances' (p. 246).

It is not the intent of the chapter to suggest that this kind of curriculum work is without challenges. It is time-consuming and requires negotiations with students, creation of new resources, assessment and evaluations, defending choice with other members of staff and living in the world of the unknown of questioning and uncertainty. One of the challenges that Audrey faced was getting other teachers in the English department to use this alternative text or seek out other culturally relevant texts. She suggests, 'it is important to make connections with like minded-teachers… there are two other teachers that I can count on to think about this work with me'. At the time of the study, there were 13 teachers in the English department; one decided to use the book Audrey used in the following semester for the novel study unit in her English curriculum. Audrey's experience raises the importance of curriculum development and decisions and how to implement curriculum changes in the best interest of students. Where curriculum decisions should lie as well as the role of the administrators and teachers in this complex journey of creating more just and equitable schooling for all students, in particular those who have been excluded and marginalised by the system is important.

There is a growing body of research that suggests that teachers can make a difference to their own professional journey and learning and the organisational structures and cultures of their school (Frost & Durrant, 2002). This kind of research points to ways that teacher leaders can engage in social justice in action and contribute to the wider professional discourse and knowledge on leadership. This kind of research agency, praxis and leadership is unlikely to happen without support given the problematic nature of schools and existing power relations and status quo (Lopez, 2005). As Audrey noted in her reflection, ‘feeling supported was important for me’. This support creates space for critical dialogue to occur and tensions to be teased out. Teachers must be encouraged to see leadership and curriculum work in their classrooms as inextricably linked.

Education that is socially just and equitable becomes an imperative as we pursue a more socially just world, where society comes to understand that it is made richer by the diversity of its people. Those who work with culturally diverse students have an ethical duty and moral responsibility to take on leadership roles and engage in teaching that interrogates what is, examines who is excluded and foregrounds new possibilities in diverse ways, including examining the texts that are used and taken-for-granted practices. A diverse population is now one of the distinctive features not only of Canadian society but much of the Western world and indeed many economically emerging states.

This chapter highlights the conscious and reflective practices that are essential for teachers to engage in bottom-up leadership and curriculum making and points to what is possible as teachers engage in critical praxis and accept the challenges of leadership. This is relevant not only to scholars, teachers and researchers in Canada but all countries with diverse populations as we seek to learn from contexts other than our own. It is important for researchers and school-based scholars around the world to heed Pinar’s (2007) call for ‘internationalisation’, to be engaged with each other and to reconstruct curriculum as we advance values of social justice and peace. Jean-Marie, Normore, and Brooks (2009) argue that socially just educators focus on research to understand more about what social justice leadership might look like in diverse countries in an effort to understand how we fully capture the impact of issues such as gender, race and culture on leadership. Teacher leaders steeped in an activist approach to social justice leadership grounded in their classroom practices will provide a cadre of aspiring school administrators who understand how to meet the needs of diverse learners and ease the conundrum of retraining and training current school leaders and administrators who do not bring these experiences. Audrey’s agency and leadership points to what is possible when teachers are located at the centre of curriculum inquiry and curriculum decision-making and when curriculum is not imposed on them. I now return to Bogotch (2011) question asked at the start of this chapter. I would contend that based on the research conducted at Greenville Secondary School and Audrey’s narrative that when curriculum is taken from teachers, teacher leadership will be severely curtailed.

Notes

1. I use the term school-based scholars instead of practitioners to represent educators who carry out their work in schools, whose practice is informed by research and who theorise about schooling from their daily lived experiences in schools.
2. The name of the participant, school and community are pseudonyms.
3. The Canadian Employment Equity Act defines visible minorities as ‘persons other than Aboriginal persons, who are non-Caucasian in race or non-White in colour’. This is a contested term, as some believe that it furthers the marginalisation of racialised Canadians. In this chapter I use the term ‘people of colour’ and diverse students to refer to Canadians other than Aboriginal peoples who are not White.
4. The Canadian Multiculturalism Act, an Act for the preservation and enhancement of multiculturalism in Canada, became law on July 21, 1988. The Act acknowledges the contributions of Canadians of all origins and their communities to the building of Canada and outlines the rights and responsibilities of citizenship set out in Canadian legislation. It encourages all of us to work together to build a society in which the principles of multiculturalism are fully realised in practice.
5. In Ontario students are streamed into three pathways to university, college and the workplace. Students on a pathway to college are placed in applied classes. Hands-on approaches are advocated for students in the applied stream who are being prepared to enter community colleges. In Ontario universities are degree-granting institutions, while colleges provide skilled training and diplomas. Some colleges have partnered with universities to offer joint degrees.
6. Caribbean country not named for anonymity.

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Chapter 27
Disrupting the Hegemonic Construction of Student Achievement: Diasporic Spaces

Marva McClean

Introduction

Framing the Issue: Seeking to Transform Classroom Oppression

I have seen from research and my own experience that schooling as it exists in North America is not serving the interests of all students, particularly students from diverse ethnic, cultural, and linguistic backgrounds (Apple, 1998b; Love, 2008; McLaren, 1998; Sleeter, 1996). In addition, educational failure continues to be a reality for many students across the globe and diverse students in particular. Strong criticism has emerged from critical scholars whose definitive body of critical research has highlighted the deleterious effects of standardization on children's academic achievement, especially in urban settings populated by students from diverse backgrounds (Apple, 1998b; Love, 2008; Noguera, 2008a; Sleeter, 1996). This body of scholarship criticizes the dichotomous perspective that has been framed by policies such as the US No Child Left Behind Act (NCLB) which identifies certain methods of instruction as suitable and others as unsuitable, upholding notions of successful students and others as failures.

Despite the outcry and a call to disrupt this pattern of schooling, state departments of education and school districts have yielded to political pressure and continue to embrace an ideology of standardization, which advocates uniformity in educational reform and ignores contextual realities such as poverty, linguistic imperialism, and racism. This ideology of standardization presents school problems as if they can be solved simply by using particular methods and programs (Apple, 2003; Kincheloe & Steinberg, 1997) such as institutionalized reading and standardized testing. Such

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programs place limits on the creativity of teachers constraining them from enacting the critical literacies that should prove useful to press for the educational advancement and success of many students. This has resulted in the academic failure of many students (Flores-Gonzalez, 2003), and in particular, diverse students, many of whom have become disengaged and disconnected and have opted to drop out.

These discourses of efficiency and accountability that characterize public education in the United States have extended across the globe as countries seek to address economic recession, placing the social justice and equity agenda at risk locally and internationally. Bogotch (2008) calls attention to the globalization of schooling where "issues of achievement, equity, and excellence have been subsumed under the assumptions of centralized authorities, politically and economically (p. 1)." Kanu (2006) echoes this perspective by emphasizing that globalization has led to a reorganization of economic models that assert an educational agenda tied to a framework of business management and efficiency standards (p. 23). I believe that this push toward standardization in the face of increasing evidence of the underachievement of some students creates injustice and inequities in education. However, even in the midst of the criticisms of the state of public education, scholars such as Kanu offer encouragement in the assertion that the emerging global realities of this post-colonial era open up space for educational leaders to seize the moment to work as interpreters of culture and curriculum rather than mere transmitters and managers (p. 22).

In line with the perspective of these critical scholars, I argue for the charting of new routes within the field of education, seeking innovative, experimental, and non-traditional methods of teaching and learning to replace outdated Eurocentric models that ignore students' multiple ways of knowing and, in particular, ignore or discredit their funds of knowledge as viable resource for classroom instruction. Like Starratt (as cited in Reyes-Guerra & Bogotch, 2011), I believe that educational leadership, including teacher leadership, must confront dilemmas, paradoxes, and structural barriers in schools and work deliberately to disrupt existing leadership paradigms that ignore the contextual specificity of schools.

In this chapter I argue that standardization fails because it does not take into account the diverse identities and needs that students bring to the classroom as well as the many forms of oppression that they continue to face (Kanu, 2006; Love, 2008). Pointing to the possibilities suggested by Kanu, I assert that addressing this need provides the opportunity for educators with a social justice agenda to step in and take action that may become transformative (Shields, 2010). Such transformative leaders, I believe, provide counter narratives that serve to disrupt the hegemonic construction of student achievement in schools where standardization is the dominant discourse.

I explore research that focuses on the notions of transformative leadership, including the implementation of critical pedagogy, connecting this to my own experience as a child educated within a post-colonial community where educators worked intentionally to create communities of practice that honored the legacy of our heritage (Nieto, 1996). I then present the classroom narrative of a teacher leader in the United States, who, through her agentive work, connects to my definition of a transformative leader, and I argue for the implementation of critical literacy as a step toward achieving social justice and equity in classrooms across the United States and, indeed, the world (Steiner et al. 2000). I write to legitimate the classroom practices of this teacher who worked purposefully to ensure that her students “are critically conscious of inequities that persist in our society and that they have the necessary knowledge, abilities, and opportunities, to redress these inequities” (Sayani, 2011, p. 73).

To strengthen my argument, I connect the teacher’s work conceptually to the notion of grassroots leadership enacted by the national heroes of Jamaica, who, although marginalized by the dominant society, subverted hegemony and attained freedom from oppressive colonial forces. I recommend that this form of grassroots leadership be utilized by social justice educators who dare to transform the society through risk-taking and the application of critical literacy. This perspective becomes the framework for the ideology on which this chapter is grounded.

Autobiography, Identity, and Civic Responsibility

Sowing the Seeds of Literacy: The Jamaican Diaspora

Apple (1998a, 1998b) speaks of the critical role of autobiography in the work of the educational leader, while Love (2008) emphasizes the significance of socially engaged instruction with diverse students. In my experience, I have seen educational leaders such as teachers, principals, curriculum specialists, and literacy researchers advocate for social justice and equity at schools pushing against the confinement of standardization to assert the right of the student to a just and equitable education through pedagogy that is embedded within the tenets of critical literacy.

In drawing parallels between my biographical data and the experiences of Diasporic students in North America, I point to my situated identities and experiences as a racialized and gendered educational leader who has traversed borders and boundaries and has witnessed firsthand the devastating impact of classroom injustices on the lives of immigrant and diverse students. I position my experiences as classroom teacher, curriculum developer, and Diasporic scholar from a critical position that seeks to disrupt existing arrangements of classroom settings where continued student failure and lack of engagement demand our attention, outcry, and action.

I locate my narrative experiences within the context of Diaspora, and I make reference to the very challenges I have faced navigating the school space as outsider. I am aware that the Diaspora cannot be essentialized nor is it homogeneous, and as such, I do not purport to speak for all, but I am aware that some experiences are common within hegemonic communities.

As a member of the Caribbean and, more specifically, the Jamaican Diaspora, I come to the field of education with a strong orientation in the value of education in shaping one’s life. At both the grade school and tertiary levels, my teachers utilized a strong sociocultural constructivist mode (Brooke & Brooke, 1999; Vygotsky, 1978) to embrace cooperative activities, dramatizations, debates, and rhetorical arguments as the core of our everyday classroom instruction, where our lived experiences were incorporated as valuable instructional material. My classrooms were environments rich with children from rural, urban, low-income, middle-class, and single-parent families where parenting was not limited to mothers and fathers but the entire communal family. This multiplicity of experiences was harnessed to fit into the instructional approach where cultural heritage became an active factor in fostering a community of practice (Wegner, 1998). These classrooms were made rich with the stories of our national heroes including Nanny of the Maroons and Paul Bogle (McClean, 2010) who engaged in subversive activities that countered the hegemonic construction of leadership through grassroots struggles that eventually led to the end of slavery.

In the classrooms of my childhood, these role models were incorporated into the curriculum as literary texts in a platform we would identify today as critical literacy. Nanny of the Maroons was presented to us as an allegory of strength and an indomitable will to face oppression with unwavering determination to disrupt its course. From our national folk history, we learned that Nanny, an Ashanti warrior from Ghana, was captured into slavery and taken to Jamaica. With fierce determination to claim the rights of freedom, she fled to the mountains of Jamaica to stage warfare against the British and undermine their authority and power in such an unprecedented manner that she became known as the thorn in the side of the British. Both the history and the mythology of Nanny converge to convey an image of a multifaceted individual whose multiple realities defied the boundaries imposed by colonialism. Through her inspiring leadership she attracted freedom fighters to the hills of Jamaica, at a site later named Nanny Town, and built up a fierce army, schooled in the intimate terrains of the land and subverted and thwarted the colonial forces of the British army.

Freedom fighter, Paul Bogle, used his platform as a Baptist deacon to galvanize the community, spreading his ideology of resistance and empowerment. In 1865, he organized the Morant Bay Rebellion, calling for the end to the oppressive leadership that had persisted after emancipation. Although Bogle was captured and hung, like Nanny, he had stirred up the winds of resistance against hegemony and ignited fires that would not be extinguished. Bogle became a folk hero during his time and, later, a national hero revered for his intuitive leadership and bravery. My teachers applied the use of imaginative language to provide insights into ways in which the daily activities of our community of practice could be connected to the work of leaders like Nanny and Bogle, asserting their story as guideposts for the journey we would undertake. I learned from my early experiences the power of potential and the motivational impact of symbolic figures in the lives of children (McClean, 2010).

It is of significance in talking about my history and identity that I note that I came of age during a time of great political upheaval and change in both our local community of Jamaica and in the broader sphere of international development, where the Civil Rights Movement sparked global awareness of the devastating consequences of disenfranchisement, oppression, and racism. From this early beginning, the act of becoming a critical thinker was set in motion for life (Bahruth, 2000). The strong winds of social change and the demand for independence in Jamaica during the 1960s engendered a climate of pro-activism, with education at its center. Later, at the University of the West Indies, critical scholars like Rex Nettleford, Maureen Warner-Lewis, and Trevor Munroe pushed us to be habitually critical, always questioning the status quo, careful to examine our own positions and ways in which we might be complicitous in undermining the development of our country (McClean, 2010). The Manley era of democratic socialism reinforced the country's vision of education as a critical factor in human development, putting children's rights at the forefront. Through the framework of democratic socialism, Prime Minister Michael Manley (1972–1980) established a policy of free education for school children where formerly education beyond elementary school was privileged and exclusive, restricted to those who had the financial resources to pay.

The beneficiary of these revolutionary changes, I uphold a strong commitment and accountability to ensuring that all children have access to a just and equitable education, regardless of their location. From this background I have come to the field with an unwavering perspective about hegemonic discourses based on my lived experiences, an awareness of the value of education as an agent of social mobilization and transformation. In my native Jamaica, I gained access to higher education as a result of the transformative work of radical leaders who were "not afraid to confront, to listen, to see the world transformed (Freire, 1970/1993, p. 21)." Today, I envision the educational leader as someone with such a profile of militancy, willing to grasp power within any available space and utilize this on behalf of disenfranchised children within the school system. The story of the teacher that is presented later in this chapter was selected because her agency for change met this criterion of militancy that I advocate is necessary at the school site where it is most essential for change to occur.

In asserting a worldview of critical praxis, I acknowledge the intensity of the challenges that teachers face daily, recognizing that reorganization of classroom instruction and pedagogy is just one aspect of the systemic changes needed. My focus is on ways to instruct children to improve the quality of learning and increase their chances of success in life (Torres and Noguera, 2008). As McLaren (1995) advocates, I envision the teacher as a political agent of change working within the classroom to implement a pedagogy of conscientization that will have a lasting impact on the lives of students as it prepares them for their role as citizens within the global environment.

Discourses of Resistance

Envisioning the Possibility of a Better World

A number of studies over the past decades have emphasized that children learn in unstandardized ways that are often unfairly measured by standardized testing (Darling-Hammond, 1995; Love, 2008; Sleeter, 1996). These studies dispel the notions that teaching and learning can be fitted within neat constructs of standardization. Students who are marginalized as persistent failures in school and who do not see themselves or their lived experiences reflected in the curriculum often experience alienation and become disengaged. The miseducation of these students is an injustice to the extent that the resulting impact is a deprivation of their life's chances of success. It is an *injustice* not to prepare students to fully participate in a globalized world and deliberately deprive them of the opportunity to become active members of the society. If we do not take action based on critical ideas and agentive work, we will continue to contribute to the unemployment of many diverse children and their inability to function as productive citizens in a democracy. This, then, must become an essential argument in the social justice discourse and one that must be taken up by a leader who is committed to disrupt the status quo.

While many speak of diverse students, I deliberately speak of Diasporic students: students who are newcomers to the United States and other regions of North America, bringing with them vestiges of their cultural heritage, including their language and multiple ways of knowing. Their heritage of colonization, economic turbulence, and social stratification places them in a Diasporic space where issues of race, ethnicity, language, and socioeconomic status intersect, calling our attention to the ravages of neocolonialism (Kanu, 2006; Love, 2008). These are the children that some call the visible minorities, children that the federal government and state and local school districts label as *others* and often, *at risk*, whether their ancestral roots connect to the Caribbean, Africa, Asia, or they are Native Americans who have been displaced on their own soil. In keeping with my ideological stance, I choose to reject these terms, laced with pejorative connotations, and select to use instead the term Diasporic which I also interchange with the term diverse throughout the chapter.

I define social justice as actions by educational leaders that confront and disrupt existing arrangements in schools and center the lives and experiences of Diasporic learners in the teaching and learning process. In this definition of social justice, educators engage in pedagogical actions that provide varied and multilayered experiences for all students (including students whose ways of learning have been normalized into the curriculum) and disrupt the hegemonic construction of student achievement. The intended outcome is that students value their contribution and come to understand how systems of meaning and power shape their lives (Apple, 1998b; McLaren, 1998).

Explorations into Social Justice: Resistance and Empowerment

In problematizing the condition of education in the United States, I apply a sociocultural perspective (Gee, 2004; Gonzalez, Moll, & Amanti, 2009; Lee & Smagorinsky, 2000) and connect my historical knowledge to the changes that I advocate should take place in the classroom through the agentive action of a transformative leader. To do so, I rely on the framework of transformative leadership espoused by Shields (2003, 2010, 2011). Shields (2010) identifies a transformative leader as one who works assiduously to study the environment in which she works in order to understand the particular needs of the community. She notes that “transformative leadership emphasizes the need for education to focus on both academic excellence and on social transformation” (p. 2). Shields (2011) further states that this leader creates a learning context that centers on democracy, equity, and justice, an environment, she emphasizes, that is necessary to foster “high achievement for all students as well as for the fulfilment of requisite accountability measures” (pp. 2–3). I find this particular framework to be most useful in my own considerations of the type of transformative leadership that is necessary to disrupt the patterns of inequity and injustice that prevails within our school system.

As Shields (2010) emphasizes, a transformative leader will remove the ceiling that constrains instruction and use the students’ background, skills, and funds of knowledge to build a richer and more diverse curriculum (Gonzalez et al. 2009). Within this setting, the child becomes a collaborator, rather than an antagonist (Noguera, 2008b). Through carefully crafted instruction, the leader holds up the world to the student and extends to her the possibility to make a connection to her reality. The transformative leader does this in a way that encourages and facilitates the child’s engagement, curiosity, and creativity. Reyes-Guerra and Bogotch (2011) add to this advocacy for transformative leadership by asserting that the curriculum must be critical and context specific. They posit the notion that an imported curriculum that is forced on the constituents is likely to fail as it may not address the particularities of that community’s needs.

Reyes-Guerra and Bogotch (2011) present a compelling argument for the need to embed curriculum inquiry at the heart of educational leadership programs. They assert that this is necessary in order to ensure that educational leaders are adequately prepared to become critical thinkers with an understanding of the diverse approaches they may apply in handling the fluid, chaotic, and pluralistic nature of schools. It is this awareness, the authors assert, which will prepare school leaders to begin that journey into the heart of a system that is crying out for mindful leadership based on the reciprocity between schools and the communities in which they are located. The authors pose a provocative question: *How are we preparing to meet the needs of our students?*

Interestingly, such a question highlights the very nature of schooling, regardless of the level or age in which it takes place. The reference establishes, for me, a clear analogy between the teaching in university classrooms and the teaching in our public school system. The point is well made. Education is at the heart of preparing minds (Eisner, 1994) to function effectively in the communities of practice in which they live. Reyes-Guerra and Bogotch explore the conceptual underpinnings of education as a force that shapes human beings, providing them with the scope to become productive members of the society. In pushing forth this perspective, they call attention to civic engagement in the community of practice and the ongoing agency to safeguard the freedom and democracy of the members of that society. This argument is central to the notion of social justice and equity in public schools. For the leader must see it as his/her civic responsibility to create an environment in which children can practice these freedoms, experience democracy as the platform of their daily classroom journey, and engage in activities that enable their growth as productive members of that society.

This perspective rejects the narrow conceptions of education that is perpetuated by standardization and the inhibitive curriculum that school districts mandate in their efforts to comply with state and federal mandates (McClean, 2004). The reciprocity that Reyes-Guerra and Bogotch (2011) speak of embraces the sociocultural and political-historical perspectives that diverse children bring to school with them, making room in the curriculum for such unstandardized and challenging material as instructional text. Reyes-Guerra and Bogotch recommend that educators begin by looking at the scope for creativity within core curriculum subjects such as science, numeracy, and language arts. *In other words, how can educators locate and evoke the wonder or awe within a subject matter and still meet the mandates, that of necessity, they must?*

Citing Shields (2003, 2010), Reyes-Guerra and Bogotch assert the moral responsibility of addressing the inequities that exist in schools. They argue that transformative leaders investigate how they might build school environments that are rooted in a strong commitment to freedom and democracy. They express the hope that "educational leadership programs will create transformative leaders and they, in turn, will bring these same teachings to the schools and systems they lead to develop democratic and relevant teaching, curricula, and citizens" (p. 152).

The message of hope that evolves from this discussion connects to the promise in children that Noguera (2008b) addresses. He declares that when educators act upon restraints with creativity and resolve, they can do much to work with children to realize their potential, reversing the identity of failure that has been ascribed to so many school children. In questioning the rampant failure that has been the experience of far too many children of color in the United States, he offers advice to educators to create an atmosphere of invitation that motivates young people to join the conversation and share their perspective and have their voices heard. According to Noguera, the instructional leader has the potential to turn lives around and give children a purpose to achieve.

Indeed, as Diasporic children move across the globe and settle in classrooms (Giroux, 1990, 1992), there must be critical consideration of their needs, their sociocultural background, and the type of schooling that will encourage their successful performance. Critical researchers such as Pacheceo (2010), Mulcahy (2008), and McLaren (1995) add to the international discourse on student achievement, emphasizing literacy as a sociocultural activity that cannot be separated from the communities in which it is practiced. They call for a focus on the students' cultural heritage as an essential component of curriculum design and pedagogy, noting that issues of language, ideology, and culture must be embedded within the curriculum design. Highlighting the imperative of a social justice agenda, Love (2008) points out how essential it is for a teacher to guide students in ways to "disrupt power imbalances" in schools (p. 33). Kincheloe and Steinberg (1997) add emphasis to this perspective by stating that people who are serious about social justice must declare their position and actively seek ways to maximize learning for diverse students who learn in unstandardized ways.

Critical Literacy and the Pedagogy of Possibility

This imperative to address the needs of the unstandardized child can be immediately connected to critical literacy (McLaren, 1995, 1998, 2000; McLaren & Kincheloe, 1997), an ideology of schooling which centers the child as a key player in the development and implementation of the curriculum (Ladson-Billings, 1995a, 1995b). Critical literacy is the most suitable framework to push the boundaries of possibilities (Vygotsky, 1978) through situated learning that establishes socially organized instruction such as oral storytelling, dramatizations, creative writing, and conversations that will have a strong impact on mean making that shapes student identity (Bakhtin, 1981; Wertsch, 2004) and intellectual development.

Social justice principles are embedded in critical literacy and teaching practices. Teachers facilitate literacy and step back as the classroom authority to create an intellectually engaging environment where the students' voice is dominant. This involves students using language to exercise power, to enhance everyday life in school, and to question practices of privilege and injustice (Giroux, 1993; Love, 2008). Within this critical framework, students explore figurative language: metaphors, idioms, and the proverbs of their ancestral and social life as they question diverse texts (both oral and written), asking questions such as motive of the author, whose voice is left out, and how might the narrative be told differently to include their funds of knowledge. In a manner consistent with Freire's conscientization, they hold discussions about the way texts represent cultural positions, ideologies, and discourses and their own place in history.

This is the kind of environment, Arias (2008) declares, that builds communities of respect, tolerance, and acceptance of diversity in schools. With its thrust on student-centered teaching, critical literacy encourages the incorporation of historical/political knowledge in classroom texts (Gee, 1990). This should strengthen students' awareness of the ways they can resist hegemony and assert their voices to change the classroom experience. McLaren's (2000) assertion that "schools in the United States need to provide students with a Freirean language of criticism and a language of hope that prepare students to conceptualize systematically and systemically the relationship among their private dreams and desires and the collective dreams of the larger social order" (p. 9) resonates with hope of the possibilities that social justice education can achieve on behalf of our students.

To Confront, to Listen, to See the World Transformed

I have applied some of the key principles espoused by social justice scholars such as Shields (2003, 2010, 2011), McLaren (1995, 2000), Reyes-Guerra and Bogotch (2011), and Sleeter (1996) to craft a definition of a transformative leader as one who grasps power and does not wait for power to be assigned to him or her within the hierarchy of the educational system. This leader has "a clear sense of the values and beliefs that undergird his or her own identity, [is] willing to take stands that may require moral courage, to live with tension, and to some degree, to engage in activism and advocacy" (Shields, 2011, p. 3). This definition certainly connects to the philosophical landscape of Paulo Freire (1970/1993, 1985a, 1985b, 1998) who speaks of the potential of the individual who works intentionally to subvert the status quo by collaborating with others to liberate them from hegemonic conditions. Like Shields (2011) and Reyes-Guerra and Bogotch (2011) advocate, such an educational leader is intentional in the building of an inclusive community that promotes democratic processes and social activism for social justice (Foster, 1986; Levine, 2007). As Freire and Macedo (1987) declare, for such a teacher leader, "this means being sensitive to the actual historical, social and cultural conditions that contribute to the forms of knowledge and meaning that children bring to school" (p. 15). This leader utilizes critical literacy to change the school environment as she recognizes that feelings of displacement and dislocation in school settings (Gay, 2000; hooks, 1994; Noguera, 2008a) can undermine student socialization and academic achievement.

The following questions have guided my inquiry: Can the teaching of language arts become a critical tool in preparing Diasporic students to function in the global environment and achieve academic success? How can educators, including teacher leaders, specialists, and administrators, resist social pressures and develop the courage and creative capacity to implement critical pedagogy in schools established on a framework of standardization? Might classroom teachers push against the boundaries of standardization and assume leadership that will disrupt the status quo within classrooms, empowering students to become lifelong critical thinkers with the tools to confront and counteract hegemony?

I observed a teacher leader during a 9-week research sabbatical and engaged in a program of collaborative inquiry with her in which I collected data through reflective journals, logs, classroom observations, and extended conversations and reflections that allowed me to critique my own practice as well, careful to [re]consider what it meant to engage in transformative work at school sites. During weekly visits to her classroom, I documented her journey and her pedagogical stance in embracing teaching as a political act of resistance and empowerment.

Social Justice in Action: Narrative from the Classroom

Grassroots Leadership: Social Activism at the School Site

Shields (2011) has stated, "Transformative leadership is a robust way of thinking about leadership that requires multiple styles and strategies" (p. 385). In the section below, I highlight how Christine (all names are pseudonyms), a teacher leader, utilized grassroots leadership practices to confront the injustices she encountered and dared to transform classroom literacy. She engaged in literacy work that emphasized the fundamental role that children's funds of knowledge play in their literacy development. In her interpretation of literacy, she extended her outreach beyond the classroom to include colleagues, parents, and the community. She demonstrated the courage to assert her ideology even in the midst of scrutiny and resistance to create a sociocultural environment for the students that empowered them as change agents themselves (McLaren, 1998). This action resonated with me as it reminded me of the role my early educators played in sowing the seeds of literacy that have lighted my own pathway in educational leadership.

At the time of the study, Christine taught language arts at Panther Middle School located in a large city in the southern United States. The student population was made up largely of immigrants from the Caribbean Diaspora (Jamaica, Haiti, and Puerto Rico) and African Americans. Recognizing how standardization has impacted schools and shaped the identity of children, Christine worked with a group of students who had been placed in her class based on low Florida Comprehensive Assessment Test (FCAT) scores and a prediction of low performance. Her task was to remediate the students by teaching identified benchmarks, utilizing an instructional calendar that included specific dates to teach certain task items, weekly measurement of those items, and a charting of the students' performance on each test to determine their marginal improvement in preparation for the looming FCAT test date.

The FCAT is the center of Florida's accountability system for student and school improvement. It was administered for the first time in January 1998 to students in grade 4 (Reading), grade 5 (Mathematics), and grades 8 and 10 (Reading and Mathematics) and was later expanded to assess students in grades 3–11 in the subject areas of reading, mathematics, science, and writing (Florida Department of Education, 2012). The FCAT consists of criterion-referenced assessments in these subjects and measures student progress toward meeting the Sunshine State Standards (SSS; recently revised as the Next Generation Sunshine State Standards, NGSSS) benchmarks. The focus is on skills competencies and grade level expectations of what students must learn along the hierarchy of the K12 school structure. The skills and competencies outlined in the Standards are embedded in the material of the student's core classes.

Student achievement data from the FCAT are used to report educational status and annual progress for individual students, schools, districts, and the State. Florida's school grades are currently based on the percent of students meeting high standards and the percent of students who make learning gains. Elementary and middle schools are assigned a school grade based primarily on student achievement data from the FCAT. Based on FCAT results, school districts mandate policies that direct teachers to instruct students focusing on specific standards and prove their mastery through this series of state scheduled tests.

Asserting Students' Funds of Knowledge as Counter Narratives

Christine, a racialized immigrant to the United States who had experienced racism firsthand, was in her tenth year of teaching. Her ideology of teaching was nurtured by her experiences as an immigrant and her pursuit of graduate studies where she read the work of Freire, Giroux, and other critical pedagogues. She was particularly inspired by the philosophy of Freire whose work she had been introduced to in her native country. She was frustrated by the negative learning environment prevalent in the school as well as in her classroom where students openly resisted the official curriculum in which they did not see themselves or their experiences. She knew that the placement of the students in her class signaled the academic identity the administration had assigned them as well as the limiting curriculum she was expected to teach. She considered herself accountable to “help her students analyze their own experiences” (McLaren, 1998, p. 217) and guide them in ways to use the tools of critical literacy to question dominant discourses and then respond through social action (Giroux, 1990). For such changes to occur, she realized, she would have to subvert the scripted program assigned to her.

Within the framework of FCAT, committed teachers like Christine are faced with the dilemma of meeting or appearing to meet increasingly oppressive performance criteria that are often in conflict with the background and learning styles of their students as well as their pedagogical stance. *How did Christine make space for her resistance within this setting of standardization?* Christine understood that power cannot be given by those in authority; it must first come from within (Kincheloe & Steinberg, 1997). During her years at the school, she (and the other teachers as well) had experienced a decrease in autonomy about what to teach, how, and when. She found herself being asked to teach utilizing practices and content material she did not agree with. Within the school district, the consequences for not complying could include increased supervision, discipline, and, possibly, job loss for both administrators and teachers. At Panther Middle School, it was a common occurrence for district personnel to turn up unannounced at the school, visit classrooms, and hold conferences with the administration about their observations. Having decided to take action to initiate the process of resistance and change, Christine began a dialogue at departmental meetings, pointing to ways to “deconstruct social-cultural knowledge frameworks that generate inequity and reconstruct them in more equitable ways” (Shields, 2011, p. 384).

She pointed to strategies teachers could use to incorporate the students’ personal experiences into the curriculum and still meet the district’s mandates. In this way, she opened up space for teachers to consider ways in which they could actively resist standardization and maximize learning for their ethnically diverse students (Boykin and Noguera, 2011; Lopez-Robertson et al. 2010). In addition to the contribution to the discussion at department meetings, she spearheaded parent workshops and professional development trainings at the school site and was well known and respected for the critical edge she took to classroom instruction. She was well aware that while she did not have the open support of the principal, she had his respect.

Resisting the Ideology of Standardization

While the principal adhered to the mandates from the state and district, he was cognizant of the needs of the students and the circumstances of their social lives. In faculty meetings he had shared the circumstances of his own working class background. But like many other administrators in the system, he was cautious about criticizing and resisting district policies in ways that might impede his own professional growth and achievement. In keeping with the School Improvement Plan that had been submitted (on demand) to the district office, teachers were required to write lesson plans that clearly stated the instructional objectives from the school-wide plan and have these written daily on the board. The requirement was that lessons must be stated in the plan with the specific district strategies indicated. In Christine's case, she matched the alternative texts she utilized with the district goals, objectives, and mandated benchmarks. She extended her pedagogy further by including the involvement of parents in the curriculum, a practice that was sought after by the district as part of its strategic plan in a county beleaguered with social discontent. When the principal questioned her use of nontraditional texts such as the folk literature she used instead of the texts identified by the district, she was prepared to point specifically to ways in which these texts met the criteria of the Sunshine State Standards.

A member of the teacher's union and a graduate student, Christine was motivated and open to evaluating her practice, taking risks in an effort to make positive change in her classroom and influence her peers to take action as well. I saw her work as a radical departure from the scripted curriculum implemented at the school and one undertaken in line with the subversive approach of grassroots leaders I referenced from my Jamaican background.

In a manner, delineated by Shields (2011) as transformative leadership, she gave thoughtful consideration to the tools and activities that would be most effective in creating the sociocultural environment that she sought to enact. In keeping with Wigfield's and Guthrie's (1997) assertion that student involvement in reading is undoubtedly influenced by the kinds of reading materials schools provide and spurred by her own immigrant experience, Christine selected folktales as the genre for a literature unit and worked to validate the rich reservoir of knowledge that the students brought to the classroom (Freire & Macedo, 1995). Like Banks (2003), she felt strongly that students are more engaged in literature that reflects their background and heritage. Committed to push against the limits imposed by the district, she negotiated the curriculum and strategically inserted the oral presentation of the tales as a respectful acknowledgment of the central position orality plays in the lives of children from the Diaspora.

In this bold move to assert her respect for her students' background, she centered the unit of study on their native heritage and guided them to participate in a critical analysis of the ideology of FCAT and the acknowledgment that the texts of their heritage had a valid place in the classroom (Freire and Macedo, 1995). She asked the students to bring to school stories pulled from their background of largely Caribbean and African American culture. In some instances, stories were pulled from the section on folktale from the classroom reading anthology. The majority of tales, however, were pulled from stories the students had heard over and over again in their homes, family tales used by parents and grandparents as a way of teaching lessons on social behavior and to confirm their world and extend their experience. Anancy stories of resistance and subterfuge, from the West African folklore genre, were a particular favorite in this classroom where the teacher guided the students in critiquing characterization, plot development, and language usage of their ancestral stories, allowing them to create a site to “revisit past, present, and projected histories and identities” (Medina & Costa, 2010, p. 57). Students interviewed their parents, teachers, and community members to add to the narrative of their tales which was enriched with contextualized meanings and culturally based expressions. This form of experiential pedagogy connected the children’s out of school life to classroom instruction, adding complexity and fluidity of meaning as it reflected their identity within the literature of the classroom.

Literature as a Tool for Exploring Multiple Realities

Christine applied her awareness of the historical political knowledge of the school community to frame their discussion around questions related to race, culture, character traits, and themes. She guided the students in critiquing the knowledge they had of these folktales and the sources from which they were retrieved and to identify and discuss examples of people they knew who exhibited qualities similar to the hero/heroine of the tale. They considered how the folktales positioned the character as part of the oral practices in their community, substantiating their comments and responses with specific details from their texts posed against their own perspectives. By enacting this sociopolitical stance, the teacher demonstrated to the students how their ordinary family stories had value in the world of the literature studied at school (Lankshear and McLaren, 1993).

Respecting the cognitive diversity in the classroom and concerned with ensuring that all students were appropriately oriented to the task, Christine posed questions along a continuum of low to medium to high cognitive complexity as evidenced below. By using this approach, she met the basic requirement of the school’s standardized curriculum and maintained her professional obligation before moving on to more robust, critical questions which reflected her perspective that a rigorous process of inquiry is needed for all students beyond the boundaries of FCAT-type “bubble in the one best answer.” She worked to ensure that the students utilized the skills of summarization, analysis, and evaluation, an important phase in the process of becoming critically conscious and proficient in language arts skills (Johnson & Friedman, 2005).

Probing Questions

1. Who is the main character of this story? What special qualities or behavior does he/she exhibit?
2. Describe his/her circumstances. Discuss the character’s behavior in this story.
3. Does he/she remind you of anyone that you know? Explain the similarities or differences. What would you say to this character if you should meet him/her?
4. What is the moral/lesson in this story?

5. Explain how the writer uses the portrayal of the main character to convey the moral of the story.
6. To what extent is this figure representative of your parents' country/history?
7. What might have been some factors that led to the creation of this tale?

As the discussion ensued, the cognitive complexity of the probing increased, accelerating to a level of intensity and deep reflection very much reflective of the approach advocated by critical scholars like McLaren (1998) and Freire (1985a) who state that sociopolitical discourses are necessary in schools to build communities of inquiry. I observed that Christine sought to guide her students to dig beneath the surface and examine multiple approaches to getting at meaning as she pushed them to become independent thinkers (National Council of Teachers of English, 2012). This dialogic stance, a recurring theme in the seminal work of Freire, placed the lesson in a larger sociocultural frame which pushed the children to examine the text from multiple perspectives as they grew in understanding that the literature they studied is ideological.

The students readily explored connections between Anancy and members of their community, touching on issues of creativity, perseverance, and survival. Some students described the Anancy character as being street-smart and cunning, with the ability to use wits to survive in any situation, while others viewed Anancy as deceptive and malicious, ready to use his wits to gain an advantage over others. Christine exploited this opportunity to push forward a nuanced discussion of the West African folk hero, Anancy, as a symbolic figure within the Diasporic imagination of subterfuge and liberation. She pushed the discussion further, urging the students to think about the ways oral practices of their heritage/community positioned the hero/heroine, juxtaposing this against their own perspectives. What was striking about this assignment was the fact that it involved the children's parents in the learning event, situating both parents and children as experts in the literature study that was linked to their personal histories and identities (Focault, 1990).

Literacy as Social Practice: Folktales Invoked Cultural Values

Christine's subversion of the curriculum became even more evident, in the next assignment where she requested that the students use the stories of their family heritage as a guide to author folktales that reflected their contemporary culture and current experiences. As they crafted their tales, she guided them, pushing their thinking with a plethora of questions including "*who or what is being represented or misrepresented?" "What are your reasons for positioning your main character this way?" "What stereotypes are being reinforced?"* For the duration of the unit, she provided feedback, giving the students the opportunity to revise and modify their work before the final submission. By extending the lesson with this creative writing activity, she allowed for more adequate considerations of the use of time in the classroom, applying a flexible schedule that gave the children room to reflect on their performance with the opportunity to work on improving the quality of their work.

Using the original stories as their model, they gave their unique interpretation to the concept of folk literature and put their individual stamp of creativity in publishing an eclectic mix of contemporary folktales supported by highly colorful and interesting visuals using web-based videos, PowerPoint presentations, booklets, and poster boards. Through these multimedia presentations the students redesigned the tales, repositioning the characters from their perspectives, giving them a richly contextualized flavor. At the end of the unit, a cultural heritage presentation was staged in the school's media center with a display of the students' work. The media specialist, the drama, and art teachers all lent a hand. This participatory program included drumming by a young adult from a local university, presentations by a cultural activist, and storytelling by one of the students' parents, a professor from the African New World studies department from a local university. The students' response was one of great delight and they seemed empowered by the notion that one of their peers had an *important* parent.

This well-planned storytelling lesson took the students outside of the classroom extending the space for the teacher and students to learn about each other over time. Activities such as interviews and recording of oral history were designed to involve family members in the lesson and to foster students' interaction with other people in the community. This provided a unique opportunity to help the students make connections with others, establish a common ground for understanding, and to celebrate cultural diversity as well as the unique attributes of people and ethnicities. It showed students the value of knowing about their roots while they unleashed their creative impulses through music, dramatizations, writing, and other creative expressions. I interpreted it as work toward transformation, liberation, emancipation, democracy, equity, and excellence that demonstrated moral courage and activism (Shields, 2011, p. 384).

Nieto (2000) recommends that teachers encourage students to talk about their culture, to attain visibility, and have their voices heard. Within this context, the classroom becomes a space for cultural validation, identity formation, and academic achievement. Christine negotiated the space for her students to appropriate multiple cultural locations of their background and (re)create new forms of literature which emphasized their voices and demonstrated their ability to read, critique texts, and create work samples in the genres they studied. This allowed them to tap into their political historical knowledge, placing them at the center of classroom pedagogy where they became expert knowledge producers (Saavedra, 2011). There is a strong political and agentive thrust in such a pedagogical stance which personalizes knowledge and allows students to connect the stories of their oral tradition (Medina & Costa, 2010) to the pedagogy of grade level literature. This conscientization (Freire, 1970/1993) of the curriculum gives efficacy to storytelling and its central role in the lives of children from the Diaspora, welding together their inner experiences and the outer world (Posner, 1998), as it extends their scope for academic achievement, providing them with lifelong skills of critical analysis.

As I stated earlier, this pedagogical stance reflects the ideology I hold that the curriculum need not be mandated material imposed from outside; of necessity, it should be co-constructed with the students, giving consideration to their background, interests, and learning styles, establishing multiple ways of being successful within the English language arts. This teacher leader astutely met the mandated expectations yet concurrently subverted the restrictions and engaged in a sociopolitical discourse that legitimated the students' funds of knowledge.

When spaces are not given, transformative leaders have a duty to create that space especially within the limits of existing structures such as standardized curriculum. This certainly reinforces Saavedra' s (2011) statement that, "the very act of asking immigrant children to remember their stories, narratives, and histories becomes a political journey to recover and offer new possibilities for decolonizing our pedagogy, theory, and body" (p. 268).When teachers focus on students, acknowledge their strengths, and scaffold instruction to meet their needs, they are lifting up their voices amid the cacophony of school reform (Neely, 2011; Nystrand, 1997) to subvert failure.

Decolonizing Pedagogy

As Kanu (2006) states that educators should, Christine worked as an interpreter of culture and curriculum rather than a mere transmitter and manager. She expanded her expectations of the children with authentic texts that tapped into the range of sociopolitical knowledge they possessed. Christine's narrative highlights the work of a teacher leader who is not afraid to confront and see the world transformed (Freire, 1970/1993). She implemented critical practices that countered scripted curricular and deficit-oriented narratives about the performance capabilities of children from the Diaspora, guiding them in the process of interpreting as well as creating texts: academic skills tabled at the highest level of cognitive complexity. Simply stated, she empowered them with both the skills and the realization that they can take action to influence their future. As Gee (2004) emphasizes, teachers can take this sociocultural stance as an invaluable resource for teaching diverse children, exploiting the opportunity to transform both the individual and the situated environment (Freire, 1970/1993). The exemplary work of teachers like Christine can assist other teachers to integrate critical literacies in their practice, perhaps pushing the administrators at their school sites to take notice and take action as well. There is the realization that change can take place from the bottom-up, that there is no one best way to challenge existing norms and power relations in schools. After reviewing this exemplary case, a key question has emerged: *How do we sustain this type of teaching practice?*

Phelan and Davidson (1993) contend that "in classrooms where students flourish, teachers know the students well, are attuned to their needs, and show personal concern for their lives. These teachers are aware of their students' precarious academic status and incorporate various pedagogical methods to ensure student involvement" (p. 85). The reciprocity that is fostered in this sociocultural environment allows for wide open spaces to create a big classroom conversation inclusive of ethnicity, gender, and national origin. This method of teaching gives children ownership over their work and performance as they are not passive receptors of other people's knowledge (Freire, 1970/1993) but critically engaged readers, writers, researchers, stage managers, and performers: active stakeholders in the production of knowledge.

Researchers have expressed the concern about how reading and achievement influences the distribution of rewards and perks in school and the society (Flores-Gonzalez, 2003), persistently marginalizing certain groups of school children. Both research and anecdotal evidence demonstrate that standardization tends to reject certain forms of literacy that diverse children bring with them, orality, for example. The example of Christine's pedagogical stance highlights an educational response to oppressive power relations and inequities in schools. The success of this classroom had much to do with the teacher merging both literate and oral instructional frameworks that bridged the link between social experiences and cognition, taking into account the classroom demographics. This approach is so central to my concept of how teachers should teach diverse/Diasporic students that I choose to highlight it as a viable approach to teach for social justice and equity.

This form of teaching is consistent with Freire's (1985a) articulation of conscientization as the process by which human beings participate in transformative acts. I therefore push for three central concepts to inform the action of educators working to disrupt the hegemonic construction of student achievement, those who believe that despite the current atrocities, there is the hope that we can transform (Green, 1983, p. 2). Such teachers assume a pedagogical stance that can revolutionize belonging, identity, and citizenship as central to our language arts curricula (Saavedra, 2011). This view is validated in the statement by Krank and Steiner (2000): "The time to adjust the culture of education to fit the learner has arrived (p. xii)." I offer the following as critical strategies to do so.

1. Assert a Sociocultural Theory of Learning in Classrooms

Implementing a sociocultural worldview in the classroom is essential in addressing the needs of Diasporic students. When educators problematize the curriculum using a situated and embodied approach, they allow space for diverse forms of knowledge such as storytelling, performances, and creative writing to be accepted. Such pedagogical actions create and provide varied and multilayered experiences rooted within the context of the children's history and social background; the outcome of which is their empowerment and an understanding of their agency in changing their educational circumstances and, indeed, their world. This stance guides students to interrogate the goals of education and the practices of the classroom. There is the affirmation that schooling is much more than achievement on tests; its larger purpose is to assist students to position themselves in history and accept their responsibility to work to change the society not to accept it as it is, or simply survive in it.

2. Empower Students as Classroom Leaders: Critical Literacy and the Pursuit of Social Justice

The articulation of political historical knowledge is recommended as a method to guide students in ways they can appropriate their funds of knowledge as classroom pedagogy. Teachers can use this to offer them a framework where they can ask critical questions and assert their ideology. They will appropriate this critical awareness to the diverse texts they encounter in the experiences of their school life. In situations with other teachers, they can request the inclusion of diverse texts in the curriculum and advocate for diverse forms of assessments, for they have learned how to transform their knowledge and subjectivities through the creation or production of literary texts such as those created by Christine's students.

3. Transformative Possibilities of Collaboration and Narrative Inquiry

Engaging in transformative leadership is challenging and absorbing work. Without supportive strategies and guiding principles, it can be overwhelming. I believe that it is important for teacher leaders to have a group of critical friends (Reyes-Guerra & Bogotch, 2011) with whom they can share ideas and collaborate. This is particularly important in the demanding realm of standardization. Love (2008) points to the challenges facing teachers who desire to bring a critical perspective to their practice. He states that, "the environment of teaching has become more and more hostile to critical education" (p. 31). Educators can strengthen their advocacy for social justice education by sharing experiences: mentoring, coaching, and critiquing each other. Such focused behavior offers guidelines for agentive work that improves the quality of teaching and learning (Mulcahy, 2008).

In addition, instructional leadership that is a shared enterprise in schools may encourage educators to examine why children fail and how their beliefs, assumptions, and practices may contribute to patterns of inequity (Friedrich & McKinney, 2010, p. 240). Under these conditions, educators search for that critical edge and make deeper changes more quickly than if working alone. There is renewed energy that comes with conversation across borders, recognizing that there is no one truth to be found, that literacy is contextually bound and embedded within language, culture, and ideology (Mulcahy, 2008, p. 22). This international perspective is essential as we move forward in the twenty-first century.

Conclusion

In this chapter I have profiled an instructional leader who is an agent of social change, aware of the opportunity cost to students and their community when injustice is perpetuated. I have presented examples of how a teacher leader works in a setting where support from school administrators is marginal at best yet manages to carve out spaces to create change. She analyzed the demographics of her classroom and re-contextualized the restrictive instructional approach to expand space for her students' intellectual development in such a manner that fostered their engagement, dialogue, and a sense of purpose (Damon, 2008). As Saavedra (2011) affirms, "If we really listen, if we really hear, we can turn language arts on its head, decenter our adult conceptions of language/literacy, and create new possibilities for teaching and learning in the language arts curricula" (p. 265). The present sociopolitical environment demands no less.

My approach to literacy education has been deeply influenced by the way I was schooled, my cultural history, and intimate knowledge of hegemony, ideologies into which I was socialized as part of my early schooling. I believe that "critical pedagogy leaves no possibility of a neutral educational process" (Krank & Steiner, 2000, p. xii); curriculum and teaching is a political act, regardless of one's position and location. Activists for critical literacy use the curriculum as a medium to break down boundaries and cross borders asserting everyday knowledge as legitimate and essential to students' classroom discourse. I assert the voices of children from the Diaspora as essential to this reconceptualized classroom discourse.

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Chapter 28

School Leadership, Literacy and Social Justice: The Place of Local School Curriculum Planning and Reform

Annette Woods, Karen Dooley, Allan Luke, and Beryl Exley

Much of the North American debate over literacy and social justice has been dominated by the state and regional implementation of centralised curriculum programmes via *No Child Left Behind* and *Race to the Top* legislation. Yet a decade into this approach to ‘closing the gap’ in linguistic/cultural minority and working class schools, there is ample evidence that centralised curriculum dictates and neoliberal accountability measures have had at best mixed results and indeed in many instances negative effects (e.g. Nichols & Berliner, 2007; Luke & Woods, 2009). The school reform literature paints a very different picture, showing that school leadership with a strong focus on curriculum and pedagogy can generate sustainable gains on conventional indicators by students from linguistic/cultural minority and working class backgrounds (e.g. Newmann & Associates, 1996; Ladwig & Gore, 2005). This chapter reviews current work we are undertaking in Queensland, Australia, where some school communities are developing and implementing school-based whole-school literacy programmes. We document the response of one school community to test-driven accountability pressures. In the approach described here, teachers and researchers worked with the ‘four resources model’ of literacy (Freebody & Luke, 1990), ‘multiliteracies’ and digital and media arts pedagogies (New London Group, 1996) while building substantive links to community knowledge, locally relevant Indigenous knowledge and traditional school subject knowledge.

School reform is a matter of both redistributive social justice and recognitive social justice. Following the work of philosopher Nancy Fraser (1997), we begin from a philosophical and political commitment to the more equitable redistribution of resources, knowledge, credentials and access to educational pathways for students from linguistic/cultural minority and working class backgrounds. The community we describe here is one where access, achievement and participation have historically

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been judged according to lower expectations than the system norms and benchmarks set for other students by middle class and dominant culture communities. At the same time, we argue that the recognition of these students and their communities' lifeworlds, values, knowledges and experiences in the curriculum and in classroom teaching and learning relations is both a means and an end: a means towards improved achievement according to conventional measures and an end goal for reform and revision of mainstream curriculum knowledge and what is made to count as valued knowledge and practice.

The work that we report is based on an ongoing 4-year project,[1] nominally a design experiment, where a team of university teacher educators and researchers have partnered with school leadership and staff and Indigenous education leaders, with the support of a federally funded grant and the state teachers' union. The intervention, known as the URLearning project, coincided with the appointment of a new principal who had an explicit focus on social justice and equity. Her stated goal was reforming the school to achieve improved student learning outcomes. The context in Queensland, and Australia more generally, is one of increased systemic high-stakes accountability measures from state and federal governments. The development and implementation of the first national Australian Curriculum for subjects English, Mathematics, Science and History has heightened tensions around teacher professionalism and deskilling, test-driven accountability and scripted teaching. In response, the Queensland state education system has provided teachers with highly prescriptive units and lesson plans. While not mandated, these units and lesson plans are being used under the aegis of 'quality assurance' in many schools, raising questions about potential impact on professionalism in a state with a long tradition of school-based curriculum development. Our work in the school has focused instead on collaborative planning and teaching with the aim of demonstrating and documenting teacher professionalism and quality teaching with students from linguistic/cultural minority and working class backgrounds.

In this chapter we begin by stating our position on social justice. We then move to describe the research context of the URLearning project, discuss our approach and detail some early trends and findings about leadership and socially just reform. Using the idea of 'distributed leadership', which was a key focus at this school, we highlight the enabling effects of leadership by both school administrators and teachers. We recognise that teachers are the most important in-school factor in student outcomes. Our research in other areas (see Luke et al., 2011; Woods, 2009) has demonstrated that shifting pedagogic relations in the classroom is crucial to social justice reform and achieving improved outcomes for all students. For this reason we discuss teachers' attempts to shift pedagogy as they worked in collegial relationships with researchers on our project team. We highlight the importance of making substantive links to the lives of young people and to local and more global events and disciplinary content as part of any curriculum reform process. We make the argument that social justice must be framed from both a recognitive as well as a redistributive perspective.

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Social Justice in School Improvement

The term 'social justice' is used so frequently in Australian education and schools that the concept risks losing definition and purpose. We take as our starting point the notion that the goal of socially just education is to create educational contexts that 'empower historically marginalised peoples and challenge inequitable social arrangements and institutions' (Hytten & Bettez, 2011, p. 8). To achieve the aim of meaningful education for all students, the literature foregrounds the importance of working towards an equitable allocation of resources and provision of opportunities, as well as providing educational contexts where diversity is recognised in positive and ethical ways. In her seminal work, Fraser (1997, 2003) discusses this as relating to recognitive and redistributive social justice. Recognitive social justice recognises the importance of making diverse languages, values, lives and experiences visible in education. Fraser (2003) describes the goal of approaches from this perspective as being about producing a 'difference friendly world' (p. 7). Recognitive social justice insists that a variety of ways of knowing and of representing knowledge must be central within the curriculum and the pedagogic relations of classrooms. Redistributive social justice, on the other hand, highlights the need for a 'more just distribution of resources and wealth' (Fraser, p. 7). From this way of thinking, social justice is about the provision of funds, resources and supports to the education of traditionally marginalised cohorts of students. Such egalitarian redistributive claims about the provision of funds and resources 'have supplied the paradigm case for social justice theorising over the past few decades' (Fraser, p. 7). A point of difference in the more recent context is that these resourcing shifts have been linked to increasing prescription and accountability.

Redistributive and recognitive ways of understanding social justice are often described as being from separate or even opposing conceptual paradigms (Hytten & Bettez, 2011). However, like Fraser (1997, 2003), we argue that approaches that emphasise one way of understanding socially just education at the expense of the other are likely to be inadequate, especially in our current climate of increasing diversity within schools and other education contexts. Our view is that school reform for equity is a matter of both redistributive and recognitive social justice. Balancing a focus on the equitable redistribution of resources and ensuring there is recognition of the lifeworlds, experiences, values and beliefs of all children and their communities are the ways to progress towards the goal of a high-quality, high-equity education system. We take this framework into our investigation of one school, now in the third year of a reform cycle aimed at improving school outcomes for students.

Towards a Narrative Account of Collaborative Agency and Action

The school in which we work is located in a satellite city, which forms part of the urban sprawl of Brisbane, the capital city of Queensland. It is in one of the lowest socioeconomic areas of South East Queensland. The majority of the 600 students enrolled at the school live close by, with very few travelling from more distant locations. Accommodation in the local area is a mix of public housing, private rentals and some owner-occupier dwellings. The school has a significant population of Indigenous students, with somewhere between 11 and 15 % of the overall student body identifying as Aboriginal and/or Torres Strait Islander. A further 14 % of the student cohort is from varied Pacific Island cultures. In all, children from 23 different cultural backgrounds attend the school. Approximately 6 % of the school population meets stringent state system criteria for the English as a Second Language (ESL) programme. These are primarily migrants from Russia and Korea and students who arrived on humanitarian visas from Burma, the Democratic Republic of the Congo and Afghanistan. Additionally, a large proportion of the student population has been ascertained as requiring some form of behavioural and/or learning support at some time during their school career. According to one of the special education teachers, all ascertainment categories for special education support are filled to allowable limits, with about a quarter of the early childhood cohort identified as needing specialist assistance for speech and hearing problems, behavioural problems and so forth.

The suburb in which the school is located is in the lowest quartile of communities by combined indicators of socioeconomic position. With a very high percentage of the families having incomes below the official government poverty line (approximately AUD $24,000 per annum), making ends meet is difficult for many families. This has been complicated by recent government ‘reforms’ in social welfare which have made school attendance a condition for receipt of family welfare payments. In summary this school was a paradigm case of a school whose students were impacted by the effects of poverty, pushed to confront a press for demonstrable gains in student achievement. This push became even more intense after increased funding was made available through the National Partnership Agreements.[2]

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[2] During this time, the school became a target for large amounts of funding as part of the Federal Australian Government’s ‘Closing the Gap’ policies. National Partnership Schools (low SES) were the recipients of resourcing through increases to general funds, principal bonuses and targeted staffing options.

We have been working with the school leadership and staff, the local Indigenous community and the state teachers' union in a 4-year project to investigate what is required to turn around the performance of a school providing education for students from linguistic/cultural minorities and working class backgrounds. Our aim is to describe how enhanced teacher professionalism, realised through school-level curriculum planning for literacy, a focus on digital media arts, multiliteracies pedagogies, an Indigenous after-school cultural/homework programme and an Indigenous language revitalisation programme can generate improved outcomes for students *sans* the test- and standards-driven, scripted curriculum models (e.g. Luke, Woods, & Dooley, 2011). Specifically, we are looking for indirect and direct effects upon conventionally measured achievement, outcome and performance indicators. In theoretical terms, our emphasis is on teacher professionalism and recognitive social justice, which we introduced in a policy and school environment where the emphasis had been on redistributive justice and more highly prescribed approaches to curriculum and pedagogy.

As the reform process began, behaviour management, truancy and disengagement with the pedagogy and curriculum, or even school refusal, were daily issues for staff and students. Special education interventions focused on dealing with the large number of students who were difficult to educate within classrooms, while a values programme attempted to bring some cohesion and whole-of-school consistency. The first task for the new administration team, dealing with behaviour issues and disengagement, was addressed by engaging the professionalism of the teachers and making moves to engage the local community, parents and local Indigenous elders and education leaders. Core to this approach was the implementation of a school-wide positive behaviour support programme. Funds and teaching resources were shifted to enable this to happen.

Once these first shifts began to demonstrate positive effects, the second approach was to enhance distributed leadership across the teaching staff in two ways: firstly, by providing opportunities for teachers to work with administration members to lead reform in particular areas and, secondly, to support all teachers as pedagogical leaders in their own classrooms through transparency in planning, pedagogy and assessment. Our team was also involved with capacity building through collegial curriculum planning relationships (see as an example Dezuanni & Levido, 2011) built on the foundation of whole-school reform and professional development that consistently required teachers to audit their practices and the assumptions on which they were building their practice (for a more detailed understanding of this professional development approach see Luke, Dooley, & Woods, 2011). Some of our planning and teaching techniques were modelled as we worked alongside teachers and made decisions with the teachers in the best interests of the students.

With effective behaviour management and attendance interventions in place, there had been a shift from deficit talk about students, families and communications in the staffroom. The after-school MediaClub (see Chandra, Woods, & Levido, 2013) and the Indigenous Cultural/Homework Hub programme (Davis-Warra, Dooley, & Exley, 2011) were flourishing. However, in the midst of all this activity, the school was struggling to show any substantive academic gains. There continued to be little attention to substantive intellectual demand, to real-world knowledge and to meaningful engagement with the students' outside classroom worlds. Outside the school gates, exploding volcanoes halted air travel; Queensland had endured its worst floods in 100 years; debates about climate change and immigration dominated national and international media; and Australia's Indigenous peoples were renegotiating a new cultural and political accord. Yet much of the work in classrooms continued to focus on test preparation (Exley & Singh, 2011), basic skills acquisition, orchestrating the complex provision of special education services and everyday classroom management. Students and teachers appeared to be doing everything except 'reading and writing the world' with their students.

With the principal's green light, we had a long, difficult and somewhat prickly discussion in a staff meeting. The issue, we explained, was one of 'intellectual demand' (Ladwig, 2007) – of upping the ante under the expectation that students from diverse cultural and linguistic backgrounds, some who were still struggling with learning basic skills, were ready and able to discuss 'big ideas', to engage with discussions and talk about the world around them, and about field and disciplinary knowledge. We made an empirical case that while basic skills (e.g. phonemic awareness and recall) were necessary for improved achievement, they were not sufficient (cf. Freebody & Luke, 1990; Paris, 2005). We explained that sustained engagement and improved outcomes for the most at risk urban learners required intellectual demand, connectedness to the world and sustained conversation (Ladwig, 2007; cf. Hattie, 2008; Newmann & Associates, 1996). Finally, we concluded with illustrations about the use of web-based and print media resources to engage students in substantive content and to teach specialised discourses of science (Exley & Luke, 2009) and the arts. To study the storms and flooding across our state, for example, we modelled the use of newspaper and newscast weather reports (for content-rich examples of scaffolded classroom talk, see Dudley-Marling & Michaels, 2012). We worked with the teachers to consider ways to shift curriculum to more visibly account for the students' lives and experiences. We encouraged teachers to shift beyond pirates and giants as assumed content for curriculum plans.

These open and robust conversations marked the beginning of some real changes to the curriculum for some teachers. (see for example as reported in Mills and Levido (2011), some teachers embraced the digital component of the URLearning project and worked with the researchers to shift unit content to 'About Me' web pages (autobiographies) constructing web logs about their home life and community interests and sharing these with a local and global community). As one of the researchers worked alongside one of the grade 5 teachers in a unit about 'healthy places in my community', there were multiple opportunities to discuss the issues. On one occasion the two were walking with the students through the local shopping mall. The students were interviewing community members for their videographies on 'healthy places'. The teacher turned to the researcher and said, 'You should hear the discussions we're having now, the questions they're asking, and their understandings of the world'. The same researcher also recalled a long talk with a quiet 10-year-old boy, a recent migrant from Russia, who had been working on his video for this same unit. Before telling the researcher that both of his (university-educated) parents were having trouble finding work because of their English, the student proceeded with a detailed comparison of health and weather conditions in Siberia *vis-à-vis* Australia. It was a classic case of a student's rich funds of knowledge coming to the fore in an educational context that otherwise would, in Bourdieu and Passeron's (1992) terms, 'misrecognise' his life experience and cultural background knowledge. The pedagogical approach in this unit aimed at the production of videographies not only provided opportunities for students' backgrounds and interests to permeate the curriculum in important ways but also engaged students in substantive discussions about issues important to their communities and the lives of those around them. This is a case where social justice was being addressed as a recognitive issue in the curriculum within the classroom.

Centralising recognitive elements of social justice in the reform of curriculum practice remained a challenge. For some teachers as they worked to up the ante on intellectual rigour in the curriculum, the default position was to focus on explicit attempts at distributing the linguistic resources of power and dominance across all students – to teach more basic skills or to be more explicit in their requirement of students to learn and use metalanguage, and these shifts had less to do with social justice in a recognitive sense. Of course these elements are an important part of the curriculum, but we have taken the stance that allowing for the lives, experiences and outside classroom capacities of all the students to be visible in the curriculum is equally important in school reform for children and young people such as those who attend this school.

Even for some of those teachers who displayed recognitive dispositions in their approach to engaging students, it continued to be more difficult to make these elements central to curriculum content selections. As an example of this, we will briefly discuss the early reform solutions trialled by one of the early childhood teachers who worked with us in a variety of ways while she taught at the school. This teacher had obvious recognitive dispositions. The classroom environment of her Year 1 class was one where expressions of diverse linguistic, racial and cultural identities were sought and welcomed. Regular classroom routines such as greetings and transitions were times when students and adults were encouraged to use a variety of languages. This same teacher engaged with diversity during breaks and after school. She was one of the most frequent teacher visitors to the weekly Indigenous Culture/Homework Hub and was the initiator of a lunchtime group to celebrate and build the cultural identity of co-ethnic females in the school. But while working with this teacher on curriculum planning, one of the researchers reflected that a redistributive focus on explicitly teaching dominant linguistic resources did take precedence over building the curriculum on the skills and experiences that the young students brought to the classroom.

This reflection came from collaborative teaching work conducted by the teacher and researcher. The collaboration was the result of the teacher's engagement in a Prep to Year 3 research discussion group facilitated by the research team members. The aim of the group was to provide a structured process for teachers to undertake self-identified investigations into aspects of literacy education, their pedagogy and their students' learning. Through regular meetings of the whole group and grade and classroom level meetings and classroom work, the teachers selected, designed and implemented their investigations. For her project, this teacher decided to work on the language of narrative with her Year 1 students. Rather than focus on bringing the students' narratives into the curriculum, she extended students' repertoires of linguistic practice to literate forms such as those assessed in the Year 3 writing task of the national literacy and numeracy tests. Her concern was with the capacity of her students, who spoke culturally and class-inflected variants of English, to produce standard Australian English in high-stakes school literacy tasks. Accordingly, she decided to infuse a previously planned, integrated curriculum unit on pirates with oral language activities. The unit was to culminate in a written narrative produced for summative assessment under test conditions and an oral narrative performed for classmates. As the term progressed the focus sharpened on topic-specific vocabulary and the schematic structure of the narrative genre.

This teacher's approach to curriculum reform came from a distinctly redistributive claim, that of the importance of explicitly teaching students to acquire the linguistic resources of power and dominance, as opposed to leaving the acquisition of these resources to chance for those already being disadvantaged by a dominant education system. In many ways the decision to take this approach was vindicated, and the students performed well during the literacy tasks. Results on assessment items demonstrated that most of the students in the class seemingly understood and could use the metalanguage for describing narrative structure. The teacher reflected that she hadn't 'dumbed it down', instead she had used the technical metalanguage with her young students, and as a consequence of the students' achievements, the teacher reported that she had been telling other teachers not to underestimate the language learning capabilities of their students. In short, while pursuing redistributive goals in a high-stakes accountability environment, the teacher's approach had raised an aspect of the intellectual quality of her pedagogy and was challenging deficit discourses. This was consistent with our project goals. But the project sought also to encourage more substantive and respectful links to the students' communities and outside class lives while upping the ante on substantive disciplinary content and on the inclusions of local and global issues of importance. In the press to improve outcomes, the essence of this teacher's approach to engaging students' lives in the classroom was shifted to more routine spaces – morning talk and floor time – with the core curriculum calling on pirates as a medium for learning about skills and language mastery. The potential of recognitive understandings of social justice reform through more substantive links to the outside classroom lives of students was not always realised. Our approach to collaborative planning and working with teachers to research their pedagogical practice allowed teachers such as this Year 1 teacher to reflect on the issues related to these curriculum decisions within supportive relationships. Assumptions were challenged and for some this led to continued renewal of practices.

Now, in the fourth year of the reform cycle, we are able to report on progress to date and to reflect on the embedded nature of redistributive and recognitive social justice practice. Simply, the school performance has improved in several key areas; daily attendance is up, and behavioural incidents are approximately half what they were when we first connected to the school. Parents are now more visible in the school across the school day, and there are tangible improvements to the general school climate and ethos. Students and their teachers are engaged in programmes based in learning and knowledge and are not so focused on behaviour management. Test score achievement is showing some signs of improvement, with gain scores and individual student tracking providing evidence that students are learning and improving their achievement targets. There remains much to achieve in relation to traditional outcome measures; however, there is a genuine drive and expectation that all students have a right and the capacity to achieve outcomes that will provide them with future pathways.

Funds from the National Partnership Agreements initiatives have been spent on developing capacity of teachers, and the results of this can be seen in the fact that, for most teachers, the recent system-based reforms that have raised levels of curriculum prescription have generally been met in professional ways, with the teachers remaining in control of the curriculum. Additionally, professional development sessions are now run by teachers and curriculum leaders based at the school. These sessions provide the opportunity for teachers to share practices and strategies. Other teachers have started to publish articles about their practices with members of the research team in professional association journals. One teacher has presented a lecture at the university and another teacher has lodged a submission to present her work at a state teaching and learning conference. Teacher professionalism is evident in these practices. The resources brought to the school by our project and used to purchase some computer hardware, cameras and audio recorders to be used as tools in media arts and literacy teaching and learning are matched by a school computer budget that means the sustainable replacement of equipment for this purpose is not reliant on outside resourcing. With respect to recognitive justice, many teachers are raising the level of substantive content within the curriculum. And the visibility of Indigenous students, their communities and concerns are visible and tangible in many of the school's practices. The Indigenous Cultural/Homework Club (Davis-Warra, Dooley, & Exley, 2011) caters to large numbers of students on a weekly basis; the school has an Indigenous language programme under its LOTE (Language Other Than English) component for students from Years 4–7, and the cultural studies component is provided to all students by an Indigenous Australian teacher. The school's Indigenous dance troop is active and has performed at significant events at the school and by invitation elsewhere, and the school choir, which comprises Indigenous and non-Indigenous students, recently sang the national anthem in the local Indigenous language at a reconciliation celebration at the school. At this same event, both the Australian and the Indigenous flag flew above the two Indigenous senior students who opened the ceremony by acknowledging the traditional owners of the land in local Indigenous language. This case supports Fraser's (2003) assertion that what is required to produce great schools for culturally diverse and working class students is a 'two-dimensional conception of justice that can accommodate both defensible claims for social equality and defensible claims for recognition of difference' (p. 9). There are elements of both recognitive and redistributive social justice in this school's approach to reform, with neither on its own being adequate to shift outcomes at the school. The reform remains very much in process, but signs of improved academic achievement, recognition of difference and equitable resourcing are evident and provide hope for continued reform towards a more socially just education for the students involved.

A Concluding Comment

Buffeted by waves of demand for accountability, quantitative indicators of ‘outputs’ and ‘performance’, leadership ‘targets’ and so forth, this school and others like it are left to navigate many mandated interventions that masquerade as reform measures. The logic and coordination of these state- and federal-level moves often seem unfathomable to teachers and principals, much less students, their families and community elders at the ground level. As a direct result of the overwhelming number of reforms targeted at the school, we observed the leaders acting as human shields, deflecting bureaucratic noise and a mountain of accountability-driven red tape away from the core business of classroom teaching and learning. This leadership approach has provided space for teaching leadership to be the focus of reform.

What our investigation of this case has borne out are several of the axioms of the school reform literature. Sustainable gains in achievement take time, at least a 3–5-year cycle that can accommodate and generate cultural and discourse change in the staffroom and classroom, professional development and local development of a whole-school literacy curriculum plan, in the context of engagement with the culturally and linguistically diverse community. During our time at the school and as part of a complex, consolidated suite of reforms, we have focussed on three keys to improved literacy and language education: (1) the gradual elimination of deficit talk in staffroom culture, teacher planning and teachers’ work (Comber & Kamler, 2004); (2) substantive and intellectually demanding teaching and learning about how to ‘read the world’; and, correspondingly, (3) rich, scaffolded classroom talk around matters of substance and weight. Ironically, in the context of an intervention focused on digital arts, popular cultural forms and new multiliteracies, our work repeatedly returns us to core issues of ‘reading the world’ and providing substantive links to the lives of the students and their communities.

Thankfully, in this case, the combined efforts of the leadership team, teachers, students, extended community and researchers show signs of success. The school has succeeded in starting to shift standardise test scores but, perhaps more importantly, has won public recognition and awards from the community, the state system and Aboriginal elders. In our view, it was the push towards intellectual demand and substance and to making connections to the students’ lives and experiences that supported the shifts in teaching and learning and classroom talk. However, we do not claim to have ‘caused’ these positive signs of improvement through our relationship and involvement in any linear or causal fashion. Instead, the view that we present is that – contrary to the most naive approaches to evidence-based policy and to the strict parameters of quasi-experimental inventions – the outcomes of research in complex school ecologies are not the direct result of our inventions – or any other element of the reform process. One of the great ironies of school reform is its perpetual search for single causal explanations for improvement of student achievement. This is in part a legacy of the historical roots of the industrial school, where the early-twentieth-century language of agricultural crop yields, Taylorist industrial surveillance of work, and behaviourist stimulus/response models established a methodological and systemic bias towards explanation and improvement via singular pedagogical/curricular 'treatments'. The result is a policy tendency to blame 'failure' or inertia on failed 'treatments' or the incompatibility of student populations to benefit from them or teachers to implement them. Thus, the education context is left to continuously seek improvement via searches for new or innovative treatments – the Holy Grail of school reform.

In conclusion, our view is that school reform and its associated goal of improvement are attributable to complex and subtle changes in the social and professional ecology of schools. At this school, the shifts have entailed strong, instructionally focused leadership and multiple catalytic researcher/teacher partnerships that result in changed teaching/learning relationships in classrooms and in after-school settings. 'Social justice' for these students and their communities can be improved via concentrated professional development and conversations that do not lose sight of the goal to mobilise, enhance and exchange teachers' professional knowledge, capacities and professional repertoires in ways that, in turn, enable the mobilisation of intellectual and discourse resources by students. In this, our final year on site, we are currently studying the sustainability of such an approach without the intensive input of teacher educators and research partners. We are also interested to consider if it is possible to expect that teachers will sustain collegial curriculum relationships with each other in the fray of practice, without at least first experiencing those facilitated by external educational enthusiasts. Part of our next challenge is documenting the complex and multiple interactions that enable and facilitate such conversations and collegial relations, without falling prey to the readily available formulae of school and curricular reform that – with all good intentions – seek out simple causal explanations of school reform, renewal and improvement.

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Chapter 29

Leading for Social Justice in South African Schools: Where Have All the Activists Gone?

Carolyn (Callie) Grant

Background and Context

The political nature of education is often ignored. However, as Smyth rightly contends, 'learning is situated in and reproduced by a particular history and context of power relations' (1989, p. 194). This is particularly so in South Africa (SA) with its history of colonialism and apartheid in which government legislation of the times perpetuated social inequality based primarily on race but also class, gender and language. The Christian National Education Policy (1948), the Bantu Education Act (1953) and the Education Policy Act (1967) were intentionally designed to segregate the people of South Africa along racial and ethnic lines. The Group Areas Act (1950) was introduced to separate urban residential and business areas according to race in order to ensure that white South Africans had access to the most developed areas. Under this Act, African, Coloured and Indian people were 'forcibly removed to racially exclusive residential zones' (Durrheim, Mtose, & Brown, 2011, p. 4).

In keeping with this racist logic, schools were also classified along racial lines, and the funding of schools differed accordingly. Schools that accommodated white South African learners were appropriately funded and well resourced, whilst African, Indian and Coloured South African learners were relegated to schools which were under-resourced and poorly funded. Thus, the Bantu Education Act was successful in that it laid the basis for 'underfunded and under-resourced mass education in the black communities, with poorly trained teachers as the educational leaders' (Bloch, 2009, p. 91). The purpose of this system of education, as Porteus argues, was to serve 'both the interests of capital (in producing a low skilled and underpaid industrial working class) and apartheid political interest (in producing a subservient and unmobilised rural population)' (2008, p. 11). To this end, control of

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education was centralised and firmly located within the white departments of education (Christie, 1998). The outcome of this system of social exclusion was a 'large degraded black sector on the one hand and an administratively and pedagogically privileged white sector on the other' (Soudien, 2007, p. 185).

However, throughout this period of colonialism and apartheid, there were waves of resistance. In particular, the resistance was led by the African National Congress (ANC) and a range of other political organisations against all forms of inequality and oppression. The field of education was one of the key sites of resistance. Schools became powerful places of struggle, a struggle for a less discriminatory and more equally just society – a struggle for the right of all to learn. The 1976 Soweto Uprising, for example, epitomised this resistance through a massive and heroic student protest which is now represented for perpetuity in the iconic image of Hector Pieterson being carried in the arms of Mbuyisa Mmakhubo, another student.

Apartheid ended in 1994 when South Africa's first democratic government came into power and the explicit intention of the state was to transform the country into a nonracist, equal and just society. The values underpinning this new democracy were captured in the new Constitution of the Republic of South Africa (Act 108 of 1996) which was built on the values of non-racialism and non-sexism in a human rights framework and which included the right to human dignity and the right to a basic education. The former racially separate departments were 'merged with responsibility to provincial ministries' (Pather, 2008, p. 61). Whilst the language of apartheid was exclusionary and authoritarian, the language of the new dispensation, Soudien and Sayed explain, allows for 'inclusion, recognition and the making of solidarity around the themes of a common humanity' (2008, p. 43). Post 1994, there was a proliferation of education policies which reflected the new government's commitment to change and its determination to 'construct an inspirational and viable vision of post-apartheid South Africa's education and training system' (Parker, 2003, p. 18). In particular, the South African Schools' Act, 84 of 1996, the National Norms and Standards for School Funding Bill (1998), the Government Gazette of the Norms and Standards for Educators (2000) as well as the Education White Paper Six on Special Needs Education (2001), as the policy text, framed the schooling context. In relation to issues of school leadership and management, the Task Team Report on Education Management Development (1996) was produced to guide schools in reviewing their authoritarian and top-down management practices, in order to develop 'participative, 'democratic' management, collegiality, collaboration, schools as open systems and learning organisations, and, importantly, site-based management' (van der Mescht, 2008, p. 14).

Yet, as Howell and Lazarus remind us, we cannot forget the importance of 'the social, political and economic context into which the policy is being implemented' (2008, p. 29). Thus, despite this array of expansive and seemingly sound and inclusive policies, their implementation has been sluggish, and the gap between educational policy and implementation in the SA context has been well documented (see Harley, Barasa, Bertram, & Mattson, 1998; Jansen, 2000; Mattson & Harley, 2002; Soudien & Sayed, 2008; Bloch, 2009). Notwithstanding these well-intentioned policies, the damaging legacy of colonialism and apartheid continues to haunt the

South African education system. In this regard, Bloch describes how ‘the strands laid by Bantu Education – of bad mass schooling, poor teaching and conflicted classrooms – have pervaded much of the present terrain’ (2009, p. 89). Thus, we live in a country wracked by poverty, illiteracy, HIV/AIDS, vastly varying sociocultural practices and rampant inequality in economic circumstances and educational provision.

This level of inequality in economic and educational provision has resulted in two different education systems operating, with the first system well resourced and successful and the second poorly resourced and struggling (Bertram & Hugo, 2008; Soudien, 2007). Unfortunately, the minority of schools are located in the first system, whilst the majority (about 85 %) find themselves in the second system. Thus, the second system constitutes the numeric norm, and Christie, Butler and Potterton (2007) refer to this numeric norm of schools as ‘the mainstream’ and, in so doing, challenge us to recognise that privileged schools in South Africa are not the mainstream – they are in the minority. Instead, the mainstream schools are the disadvantaged black schools of our apartheid legacy which need to be held in focus because they are ‘important in finding strategies to achieve equity and quality for all’ (2007, p. 100). The primary job of government is therefore ‘to attend to the mass of pupils who find themselves in non-performing township and rural schools, pupils from the poorer schools, whose poor education reinforces their desperate state of exclusion and marginalisation in a democratic country’ (Bloch, 2009, p. 109).

As members of the ‘mainstream’, learners in rural and township schools have little access to economic and social capital, unlike their nonmainstream counterparts. The majority of these mainstream schools are not racially integrated; they are linguistically homogenous and currently still serve Black South African learners (Porteus, 2008). For this mainstream, the major challenges faced are most often directly related to context. Challenges in these schools arise directly from the poor socioeconomic conditions and include, but are not limited to, health issues (HIV/AIDS-related illnesses, effects of malnutrition), poverty issues (hungry learners, illiterate parents, under-resourced schools), family issues (lack of parental involvement, child-headed households), problems with management and administration (weak and unaccountable authority structures, lack of systems and processes) as well as issues related to the profession (curriculum overload, teacher demotivation, under qualified teachers). These ‘unfreedoms’ (Sen, 1999 in Porteus, 2008) can be overwhelming and can undermine the capacity for leadership and positive social action.

Schools in the first system are the ‘nonmainstream’ schools, and a different set of challenges faces these schools, the urban schools in SA. These schools, because of their history of privilege, are generally more affluent and more functional than their counterparts. However, because of the migration of people from the rural areas and the townships to the urban areas, post 1994, in many of these nonmainstream schools, ‘the demographics of student intake have shifted dramatically’ (Bloch, 2009, p. 129). Thus, nonmainstream schools have become what Ranson (2000) calls ‘communities of difference’ because they are increasingly characterised by cultural, racial, ethnic and religious diversity, and this is where the leadership challenge in these schools lies.

This two-tier education system in the SA context serves not only to perpetuate but, sadly, to 'accelerate historic patterns of social inequalities' (Porteus, 2008, p. 19). As Bloch explains, 'the cycle of exclusion and marginalisation is reproduced and deepened through the schooling system itself, with the most negative effects on poor schools and pupils who can least afford it' (2009, p. 124). So against this backdrop, how do we go about breaking the cycle of exclusion and marginalisation? Where do we begin? What do we do? In response to these questions, I contend that a useful starting point is to look at the transformation of schools through the lens of critical education leadership. My research leads me to believe that a critical education leadership perspective offers us the tools to think about issues of leadership, transformation and inclusion in our country differently, and it is to this argument that I now turn.

'Education Leadership': A Contested Terrain

Like many concepts in the field of education, the concept of 'leadership' is a contested term, and its 'usage varies at different times, in different countries and in different professional cultures' (Coleman, 2005, p. 6). In an attempt to understand the contested terrain of education leadership in SA, I would like to take the reader back to the seminal work of William Foster. Foster (1986, 1989) argues that before the concept 'leadership' can be understood and used, it is essential to tease out two particular traditions of leadership research, the political-historical and the bureaucratic-managerial. For Foster, on the one hand, the study of leadership through the political-historical lens is 'a study of power, politics and historical fact' (1989, p. 40) which focuses on the task of important individuals throughout history who have played a pivotal role in transforming their social situation through the use of their power and the resources at their disposal. In the SA context, these 'symbolic heroes' (Watkins, 1989) or 'great' individuals (Foster, 1989) in the struggle against difficult odds include icons such as Nelson Mandela, Lillian Ngoyi, Steve Biko and Albertina Sisulu.

On the other hand, the study of leadership through the bureaucratic-managerial lens assumes that leadership is 'a function of organisational position; the 'leader' is a person of superior rank in an organisation' (Foster, 1989, p. 43). The bureaucratic-managerial model connects the leadership process to a hierarchical division of labour, managerialist discourse and management pedagogies such as 'the reduction and standardisation of knowledge; the measurement of attainment against predetermined objectives and standards; and the allocation of teaching resources so as to maximise output' (Smyth, 1989, p. 197). This notion of leadership is instrumental in nature and based on functionalist assumptions (Rizvi, 1989) which, as Angus argues, 'largely ignore political and ideological influences on organisation and administration' (1989, p. 75). In addition, this functionalist leadership perspective operates authoritatively to support those in positions of 'administrative power, thereby conserving and reproducing the status quo' (Watkins, 1989, p. 9). Watkins further contends that it is therefore able to 'sanitise the unequal power relations within an organisation' (p. 11). In this bureaucratic-managerial tradition, leadership is conflated with management and any power the concept of leadership presents us with is rendered powerless.

However, for the purpose of this chapter, I align myself with Foster and Smyth who challenge the bureaucratic-managerial model of leadership and adopt instead a political-historical lens. Positioned in this way, I contend that leadership cannot be conflated with management. Leadership is not powerless, and it cannot be reduced to a 'how-to manual for aspiring managers' (Foster, 1989, p. 46). Instead, it is powerful and situated in its social, historical and cultural context (Watkins, 1989; Spillane, Halverson, & Diamond, 2004). Leadership is like energy, and in an organisation dedicated to democracy, it should emerge organically (Rizvi, 1989). It is infinite, not limited by formal authority and it permeates a healthy school culture (Lambert, 1995). It can spring from anywhere and 'is an act not bounded in space and time; it is an act that enables others and allows them, in turn to become enablers' (Foster, 1986, p. 187). Said slightly differently, leadership is educative because it enables the 'best' ideas to emerge in an informed and participatory process which ensures that all voices 'be adequately heard regardless of class, race, gender or position in the formal hierarchy of the school' (Smyth, 1989, p. 191). Thus, whilst 'management' seeks to control and maintain the status quo of current organisational arrangements in the most effective way possible, 'leadership' is more fluid and critical and seeks to challenge the status quo in order to enable change and social inclusion. In other words, it is transformative of social conditions and ethical in focus (Foster, 1989; Shields, 2006).

Understood in this way, leadership as a critical practice offers individuals a critical lens through which they 'can better understand structures of oppression, domination and exclusion in society' (Muthukrishna, 2008, p. 3). It focuses on the extent to which the power which permeates our socially constructed world gives 'force to the human agency of people in organisations' (Watkins, 1989, p. 26). Here human agency can be defined as 'the thoughts and actions people take – individually and collectively – to change their worlds to navigate better lives and a better world' (Porteus, 2008, p. 13). People are active and knowledgeable, and as agents, they can either surrender to or rise above the social structures and the 'unfreedoms' they face. In line with this thinking, Rizvi (1989) reminds us that transformation can only be achieved when the people who belong to a particular organisation can see the reason for changing. Having framed this chapter with Foster's bureaucratic-managerial and political-historical models as well as his work on the critical aspect of leadership, I now move on to outline the empirical studies which underpin this chapter.

The Doctoral Study

This chapter draws on a doctoral thesis by publication which was designed around seven published academic journal articles and one book chapter. These eight pieces of work are referred to in the thesis and in this chapter as chronicles to capture both the narrative of events as well as the chronology of the research process underpinning them. The broad aim of the doctoral study was to 'trouble' the terrain of teacher leadership – at the level of both theory and praxis, in the South African mainstream schooling context. The thesis was retrospectively driven by three research questions: (1) How is teacher leadership understood and practised by educators in mainstream South African schools? (2) What are the characteristics of contexts that either support or hinder the take-up of teacher leadership? (3) How can we theorise teacher leadership within a distributed leadership framing? I was particularly interested in the leadership practices of teachers in terms of their potential as 'agents of change' in schools and specifically the post level one teacher who was classroom based and did not hold a formal management position. In addition, I included in the category of 'teacher as leader' the School Management Team (SMT) member because for me, teacher leadership can be defined in terms of both informal and formal leadership roles that are undertaken.

In relation to context, the studies which informed the doctoral thesis were primarily located in mainstream schools in KwaZulu-Natal (KZN), schools in SA's second education system. This was because I did not want in any way to sketch an unrealistic picture of teacher leadership in the province, and so I deliberately targeted educators who had experience of teaching in historically disadvantaged schools in relatively poor socioeconomic circumstances. These schools are strikingly similar to what MacBeath, Gray, Cullen, Frost, Steward and Swaffield term 'schools on the edge', that is, 'schools living on the precarious edge between success and failure' (2007, p. 1). Schools like these are socially and economically disadvantaged, and, as a result, they 'face a constant struggle to forge a closer alignment between home and school, parents and teachers, and between the formal world of school and the informal world of neighbourhood and peer group' (MacBeath et al., 2007, p. 1). Whilst in first world countries like England, these schools are on the periphery of the social mainstream, in SA these schools, by virtue of their majority, are 'the social mainstream'. And, as I argued earlier, it is these schools that must be the focus of our research if we hope to find strategies to achieve equity and quality for all.

Six studies (five qualitative and one quantitative), beginning in 2004 and ending in 2008, informed the publication of the eight chronicles (see Table 29.1, Appendix). The initial qualitative study (on which Chronicle One was based) explored the perceptions of 11 South African tutor-educators at the University of KwaZulu-Natal. The study was designed as a tutor self-reflective journaling process over a 6-month period. It was the initial study conceptualising teacher leadership through a grounded theory approach. The second study (on which Chronicle Two was based) concerned the fact that 'while the findings of the first study contributed to knowledge production on teacher leadership in SA, there was almost no mention of teacher leadership as it related to issues of gender'. This silence led to studying the relationship between gender and teacher leadership. Here a focus group interview process with 18 KZN educators was adopted.

Chronicles Three and Four were part of the third study, a larger National Research Foundation (NRF) Project aimed at mapping barriers to education experienced by children and adults in the context of the HIV/AIDS pandemic in a small country town in KZN. A colleague and I examined the voices of the SMT members and the District Official on their views regarding HIV/AIDS as one of the major barriers to basic education for learners in schools. Using an interpretive research design, we obtained rich, detailed accounts of the SMT's perspectives and experiences of leading and managing schools in the context of the HIV/AIDS pandemic. The fourth study (on which Chronicle Five was based) was also located within a larger research project which arose from a partnership established between the University of KwaZulu-Natal, South Africa and Bridgewater State College, Massachusetts, in the United States. The goal of the project was 'to develop and research a replicable and effective school-based model of professional development for teachers in KwaZulu-Natal' (Chronicle 5, p. 90). I explored, using a qualitative case study approach, the leadership roles that educators across four schools enacted in the take-up of the new learning in their classrooms and schools and the particular leadership challenges they faced in negotiating this new pedagogic learning.

The fifth study (on which Chronicle Six was based) was designed as a small qualitative study and implemented in two previously disadvantaged urban primary schools in KZN. It aimed to explore notions of distributed leadership within the two schools in order to determine whether the SMT either promoted or posed a barrier to the development of teacher leadership. At each of the two schools, the participants included members of the SMT and post level one teachers. Multiple data collection methods were adopted in an attempt to gain a rich picture of teacher leadership from the different participants. The sixth study and the only quantitative strand (the basis for Chronicle Seven) was designed as a postgraduate student group research project under my coordination and leadership. It aimed to teach and support Bachelor of Education Honours students in doing research using quantitative methods. It involved survey research and the use of self-administered, closed questionnaires to 1055 teachers to obtain their perceptions and experiences of teacher leadership.

Discussion of Findings

Leadership: A Confused Nomenclature

'Leadership', conceptualised through a critical lens to incorporate human agency in the transformation of society, was actively opposed during the apartheid era in SA, in a bid to control and manipulate the education system. Thus, when the term was used, it was conceptualised as a means of control and understood in terms of 'position, status and authority' (Chronicle 1, p. 512). In direct contrast, present-day policy rhetoric calls for leadership which is transformative and which will confront instances of social injustice and discrimination in SA schools. However, an analysis of a text such as the Task Team Report on Education Management Development (1996) reveals that the phrase 'education management' is used in preference to 'education leadership', and although the authors state that they 'make a distinction between management and leadership' (Department of Education [DoE], 1996, p. 28), the distinction is not made explicit. This ambiguity in the report signals 'either a potential slippage in usage of the two terms or an emphasis on management processes at the expense of leadership' (Chronicle 6, p. 289). I argue the importance of differentiating between these two fundamentally different concepts in order to retain 'any power the idea of leadership offers to us' (Foster, 1989, p. 48).

My studies revealed that, whilst educators engaged with the rhetoric of participatory forms of leadership (Chronicle 6; Chronicle 7), at the level of practice, educators worked from a 'faulty premise that leadership means headship' (Chronicle 2, p. 56). Leadership was primarily understood 'in relation to headship, equating principal with leader' (Chronicle 1, p. 518), and, as one educator commented, leadership 'often remains located in the person of the principal who is sometimes unwilling to relinquish power to teachers' (Chronicle 2, p. 55). Similarly, another educator explained how the power and decision-making at her school was centralised 'firmly in the hands of the principal and deputy principal at the top of the pyramid' (Chronicle 5, p. 101). In these situations, educators argued, principals 'simply rely on their senior management team to support them in leadership and decision-making, regardless of the expertise, or lack thereof, of their senior members of staff' (Chronicle 2, pp. 55–56). Thus, the data portrayed a dominant understanding of leadership as headship across the studies, predictable given South Africa's authoritarian political and cultural heritage. This form of authoritarianism in my studies expressed itself in hierarchical social relationships which were defined 'by seniority in terms of the positions people occupy as well as by age' (Ramphele, 2008, p. 115). However, whilst principals are accountable to the Department of Education by virtue of their formal management positions, the data further revealed that this 'does not necessarily make them good leaders and neither does it give them the monopoly in issues of leadership' (Chronicle 8, p. 183).

Whilst the 'leadership as headship' conceptualisation was dominant across my studies, there were instances where leadership was viewed as a shared activity. However, as a shared activity, it was frequently understood within a hierarchy of social relationships, as the following excerpt attests: 'I believe a leader may be part of every hierarchy in the school – right down to the classroom teacher' (Chronicle 1, p. 518). Where teacher leadership was acknowledged, it was often discussed 'within a discourse of delegation' (Chronicle 6, p. 295) and restricted to a minority of staff, selected 'on the criteria of experience, seniority and expertise' (Chronicle 6, p. 297). Thus, the SMTs, in the majority of cases, firmly controlled the leadership and decision-making processes, as suggested in the following quotation: 'So you would basically use them and their expertise and appoint them as leaders so they will coordinate and take over this activity' (Chronicle 6, p. 295). Another teacher explained how 'we have freedom with consultation or with his approval' (Chronicle 5, p. 100). However, there were times when this imposed practice was rejected by teachers because it involved 'unwanted [managerial and administrative] tasks being passed down the hierarchy to the teacher' (Chronicle 6, p. 296).

Implicit in this discussion of 'leadership as headship' is the issue of gender, and it is important, at this juncture, to reflect on this as a potentially discriminatory practice. Rural communities in SA, within which the majority of mainstream schools are located, remain largely patriarchal (Magwaza, 2001), and, in many of these communities, 'male dominance is still a fact of life at all levels' (Ramphele, 2008, p. 239).

In line with this thinking, one of the qualitative studies found that 'in KwaZulu-Natal, both the Xhosa and Zulu cultures are extremely traditional and patriarchal with power being vested in the position of the male' (Chronicle 1, p. 526). Here patriarchy is understood as 'the male hierarchical ordering of society, preserved through marriage and the family via the sexual division of labour' (Clarricoates, 1980 in Ball, 2004, p. 7). This division of labour between the sexes, Bourdieu argues, 'gives politics to the man, just as it gives him the outside, the public arena, paid work outside the home, etc., whereas it assigns woman to the domestic interior, unrecognised work, and also psychology, feeling, the reading of novels, and so on' (1993, p. 161). Through this patriarchal lens, men are viewed as leaders in public institutions such as schools, a view endorsed in another of the qualitative studies: 'Effective education leadership is the domain of the man' (Chronicle 2, p. 48). Because women are not authorised to speak on issues of leadership, they therefore had 'very little credibility as leaders' (ibid, p. 47) and had to work 'twice as hard' (p. 49) as their male counterparts to earn the respect of their communities. Where women were permitted to lead, their leadership was often restricted, based on a gendered interpretation of their abilities and roles. For example, in one of the qualitative studies, it was suggested that 'cultural committees and catering committees are largely the domains of women while sports committees are the homes of men' (Chronicle 2, p. 53). Furthermore, in meetings 'the task of writing the minutes' (ibid, p. 53) was, in some instances, the role of women, whilst financial matters were often dealt with by men.

It is apparent from the findings across the studies that the bureaucratic-managerial model has influenced and continues to influence our SA education system. The evidence reveals that leadership is primarily articulated within a discourse of managerialism and is commonly understood within a hierarchical division of labour. Thus, it posits a notion of leadership which is instrumental in nature and which reproduces, rather than challenges, the status quo. In this bureaucratic-managerial tradition, leadership is conflated with management and any power the concept of leadership presents us with is sadly rendered powerless. Furthermore, teachers are 'domesticated into existing power structures' (Gunter, 2001, p. 60) rather than being enabled to operate as social activists in schools.

Leadership in the Zone of the Classroom

Despite the profound focus on 'leadership as headship' within a hierarchy of social relationships, my studies did reveal some level of shared leadership activity, enacted in the form of teacher leadership. In line with the thinking of Harris and Lambert, I agree that teacher leaders are, in the first place, 'expert teachers, who spend the majority of their time in the classroom but take on leadership roles at times when development and innovation is needed' (2003, p. 44). It follows therefore that the centrality of the classroom is crucial to an understanding of teacher leadership, and we should not fall into the trap of thinking that only activities outside the classroom constitute leadership. Within the classroom, a critical role of a teacher leader is that they continue to teach and improve their own teaching.

This focus on increased teacher knowledge and teacher learning as teacher leaders became more expert in their knowledge and practice within the confines of the classroom (Zimpher, 1988) is unsurprising given the emphasis on curriculum reform in SA over the past 15 years. South African teachers have had to engage with a number of iterations of the national school curriculum over a relatively short space of time: Curriculum 2005 (1997), the National Curriculum Statements (2002) and, most recently, the Curriculum and Assessment Policy Statements (2011). In order to keep abreast with the many curriculum changes, teachers have been exposed to a range of professional development initiatives and Department of Education workshops on how to teach the new curriculum.

Given the national obsession on curriculum reform in SA, the findings from across my studies in relation to classroom-based teacher leadership are not unexpected. In the quantitative study, the highest percentages of teacher leadership examples emanated from the classroom (Chronicle 7). In one of the qualitative studies, there were examples of teachers from across four schools 'taking up leadership in their classrooms and experimenting with some of the new pedagogic learning from the courses in order to improve their own teaching' (Chronicle 5, p. 94). In another study, there was a sense that 'teachers are the designated leaders. They set the goals, implement procedures, instruct, guide, facilitate, mobilize learners, motivate and inspire learners and model behaviour' (Chronicle 1, p. 519). Chronicle 5 was replete with examples such as 'I understand it now and love to teach' (p. 94), 'I worked with the learners at their level and got better results' (p. 94) and 'I found that absolutely fascinating, and we saw how the children themselves ordered and re-ordered and they actually learnt …' (p. 94). This increased knowledge resulted in 'an increased professional identity and confidence in teaching' (p. 95). The reflective role of a teacher leader was also evident in the following excerpt: 'I used to teach and rush to complete the lesson I am teaching. But I noticed that now when you teach, you must go steady. You teach, you observe the learners, the things they are doing, like the structures. It was an ongoing process; step-by-step-by-step' (Chronicle 5, p. 94).

These findings tentatively suggest that, in the context of the SA schooling system, we have much to be hopeful about. In the private space of the classroom, examples of knowledge competence, teacher commitment and care coupled with innovative teaching practices strongly suggest the existence of teacher leadership. This is a major shift from the apartheid days when, in the majority of mainstream schools, teacher compliance was encouraged at the expense of innovation and autonomy.

Teacher Leadership: Collaboration with Other Teachers

Retaining the political and pedagogical value of improved teacher knowledge and learning within the classroom, my studies also provided examples of teacher leaders working collaboratively with colleagues in order to expand their subject knowledge and pedagogic content knowledge. The quantitative study revealed 'that 32.2 % of the teachers often or always led outside the classroom by providing curriculum development knowledge to their colleagues' (Chronicle 7, p. 411). Teacher leaders operated as 'curriculum leaders, grade heads, leaders of various committees' as they worked collaboratively with their colleagues 'to develop new curriculum methods and planning jointly' in their schools (Chronicle 6, p. 295). Collaboration was evidenced in the establishment of 'grade committees' (Chronicle 1, p. 520) or phase meetings where 'there were discussions on the different methods' as well as a sharing of 'ideas with other teachers in her grade' (Chronicle 5, p. 96). The data further revealed that teachers were actively involved in 'the planning of extra-mural activities in their schools (47 % often or always) and in the selection of textbooks and instructional materials for their grade or learning area (71.6 % often or always)' (Chronicle 7, p. 411). These examples of teacher collaboration in mainstream schools are both impressive and essential in the context of the 'curriculum flux' in SA since 1997. They suggest that despite the low teacher morale in the country, there are teachers who have not given up hope; teachers who are committed to their learners and who are passionate about their work. It is these teachers who need to be nurtured; it is their practices which need to be the focus of our research, and it their stories of success despite the overwhelming odds which should be broadcast for the country to hear. In this way we will be able to build a more socially just and inclusive education system in our country.

Whilst the take-up of teacher leadership was fairly convincing in the provision of the curriculum/extra-curriculum role across my studies, the role of leading in-service education did not emerge as a strong indicator of teacher leadership. But this is not surprising given that SA has a history of teacher education professional development being led by government. Although policy rhetoric supports the notion of school-based leadership and professional development (DoE, 1996, p. 29), in practice teacher professional development remains centralised. In support of this assertion, in the quantitative study, 'a mere 19.2 % of the teachers in this study claimed to often or always provide in-service training to their colleagues whilst 31.2 % of the teachers said they sometimes provided in-service training to assist other educators' (Chronicle 7, p. 411). In two of the schools in one of the qualitative studies, there was some evidence of this in-service training role, as the following excerpt illustrates: 'some teachers were offering informal in-service education by sharing new methods and operating as leaders in developing work plans for the grades' (Chronicle 5, p. 97). Furthermore, in relation to this role, there was mention of the informal mentoring of beginning teachers (Chronicle 6, p. 295), perhaps more correctly termed induction. Whilst mention was made, in the fifth chronicle, of informal 'discussion, reflection and mentoring' (p. 96), there was no reference to a formal-mentoring or peer-coaching role (Joyce & Showers, 1982).

Despite it being an integral aspect of the 'Integrated Quality Management System' and 'Whole-School Evaluation' (DoE, 2001b), performance evaluation of teachers was not a strong indicator of teacher leadership across my studies. In the quantitative study, there was reference to the occurrence of performance evaluation:

'only 38.4 % of teachers often or always participated in the performance evaluation of their colleagues' (p. 411). In one of the qualitative studies, 'peer observation' (Chronicle 6, p. 295), an aspect of performance evaluation, was mentioned. However, in another qualitative study, peer observation did not seem to take place, as the following excerpt indicates: 'As an HOD, I am a full-time teacher. There is very little chance that I get to go out and observe and to see how it's being implemented' (Chronicle 5, p. 96). This excerpt speaks to 'overload' as a recent feature of the SA education system. The post-apartheid 'curriculum flux' has resulted in 'policy overload' (Chisholm, 2005) of teachers and SMT members alike and serves to inhibit the take-up of teacher leadership.

Thus, the findings suggest the existence of teacher leadership across the studies as teachers worked collaboratively with colleagues, primarily in formal committee work. Formal committee structures included grade or learning area committees, extracurricular committees and phase meetings. Here we see the influence of the bureaucratic-managerial tradition on educators' understandings of teacher leadership across the studies. Educators, when talking about teacher leadership, often described the concept in terms of management structures, processes and discourses and, in so doing, conflated leadership with management. Thus, their experiences of teacher leadership were restricted in nature (Harris & Muijs, 2005) and limited to individual teacher agency. Authentic leadership, which is organic and organisational and which is not limited by formal authority, was the exception rather than the norm across the studies. From the evidence presented, it can be concluded that politics and history continue to have a powerful influence on present-day leadership practices in SA.

Teacher Leadership and Decision-Making in Issues of Whole School Development

Teacher leadership is often promoted in the literature to nurture a more democratic, communal or communitarian social system for schools and schooling (see, e.g. Hart, 1995). This is because, as Harris and Muijs rightly argue, teacher leadership is primarily concerned with 'enhanced leadership roles and decision-making powers to teachers' (2005, p. 16). In relation to the leadership of teachers and their participation in decision-making, and of particular relevance to the SA context today, I contend that the greater the participation of teachers in decision-making, the more chance there is of initially engaging with the structures of oppression and exclusion and, thereafter, rising above them to bring about a better school.

However, South Africa's policy of apartheid excluded teachers from any decision-making at a whole school level, and this legacy continues to haunt schools today. Given this contextual backdrop, my studies revealed some examples of teachers participating in decision-making at the level of whole school policy development. These included teacher involvement in 'school tasks teams, such as those related to developing school policy, staff development, and the school development team' (Chronicle 1, p. 520). They involved 'decision-making' in the development of 'school policy on aspects related to homework, assembly, discipline, pupil admissions and sporting codes' (Chronicle 6, p. 295). They also included management functions such as 'responsibility for stock, textbooks and uniforms' (Chronicle 1, p. 520). Whilst these examples illustrate what 'leadership' practices the educators were involved in at a whole school level, they do not provide sufficient insight into the nature and level of participation. In this regard, the quantitative study revealed that teachers 'were not often involved in school-wide decision-making processes and when teachers were involved, this was usually restricted' (Chronicle 7, p. 412). Data from this study indicated that only 30.5 % of the teachers were 'involved in in-school decision-making' (ibid, p. 12), and whilst teachers enjoyed a high level of involvement in 'setting of standards for pupil behaviour in the school' (67.3 %), they were less involved in activities such as organising and leading 'reviews of the school year plan' (27.2 %), setting 'the duty roster for their colleagues' (14.1 %) and participating in 'designing staff development programmes' for their school (11.8 %).

These findings from the quantitative study were strengthened by the qualitative studies and endorsed the argument that teacher involvement in decision-making at a whole school level was severely restricted. For example, in one of the qualitative studies, 'teacher participation in school decision-making processes highlighted the mere rhetoric of collegiality' (Chronicle 6, p. 298). Accounts of how SMT members interacted with DoE artefacts (such as policy requirements and directives) and school artefacts (such as agendas of staff meetings) revealed 'hierarchical relations' (Chronicle 6) and 'monologic spaces' (Chronicle 3) 'within a culture of contrived collegiality' (Chronicle 6, p. 299). 'Monologic spaces', I contend, are characterised by an absence of collegiality, a lack of authentic dialogue together with a lack of trust and transparency. They are spaces of 'inequality, insecurity and fear' (Chronicle 3, p. 11) where 'the powerful dominate and deny others the right to speak' (ibid, p. 7). Furthermore, they are most likely to emerge in 'a regime of autocratic leadership and hierarchical school organisation' (ibid, p. 7) where lip service is paid to teacher participation and dialogue in decision-making which is a strong indicator of 'a lack of valuing of teacher voice and authentic dialogic space in the school' (Chronicle 6, p. 298). In these instances, leadership was primarily understood in terms of 'policy implementation and the development of school structures in a bid to carry out policy directives within a hierarchical chain of command' (Chronicle 4, p. 55). This resonates with the work of Hargreaves who contends that although teachers are often co-opted as 'leaders', their role merely involves 'fulfilling administrative purposes and the implementation of external mandates' (1992, p. 83).

However, the legacy of apartheid with its entrenched bureaucratic-managerial model of leadership and its devaluing of teacher voice is only one of the factors which have contributed to the exclusion of teachers from authentic decision-making at a whole school level. A further significant factor is a societal factor stemming from poverty issues in the country, exacerbated by the HIV/AIDS pandemic. The AIDS pandemic is pervasive, and its impact on schools and schooling in SA has been well documented (see, e.g. Muthukrishna, 2008; Pather, 2008; Porteus, 2008; Ramphele, 2008). Across my studies there were references to poverty and HIV/AIDS. For example, one qualitative study alluded to 'organising feeding schemes for learners' (Chronicle 6, p. 295) and recognised 'teachers' involvement and leadership within the HIV and AIDS "Love Life Campaign", an annual event held by external organizers to raise awareness of the presentation of suicide and drug abuse amongst school children and the community' (Chronicle 6, p. 293).

In another qualitative study which focused on leadership in the context of the HIV/AIDS pandemic, a 'culture of silence' (Chronicle 3; Chronicle 4) was found to exist in the research schools. This 'haunted space' (Ramphele, 2008) of silence prevented authentic leadership from emerging because 'instead of dialogic spaces of trust, caring, and inclusion which encouraged critical reflection and action, a form of monologic space prevailed' (Chronicle 3, p. 13). This resulted in 'a lack of voice on the part of the educators and the learners and by disengagement from authentic dialogue about the realities of living and coping with HIV/AIDS' (Chronicle 4, p. 49). It became clear that the SMT members, the formal leaders in the place of the school, were not actually leading in relation to issues of HIV/AIDS. They seemed unwilling (or unable) to create a sufficiently safe space in which to talk about HIV/AIDS and demonstrated 'a paralysis in respect of authentic dialogue and leadership' (Chronicle 3, p. 13). In relation to the pandemic, they were 'not creating safe and secure places for people to connect with each other and learn together' and neither were they 'setting new directions and gathering information through dialogue' (Chronicle 4, p. 51). They seemed 'unwilling to break the silence around HIV/AIDS for fear of the stigma attached to it' (Chronicle 3, p. 13) and instead attended to the more 'superficial and technical interventions (in relation to HIV/AIDS) in response to bureaucratic directives from the DoE' (Chronicle 4, p. 51).

Thus, the evidence from across the studies suggests that, where teachers were involved in school-level decision-making, it was at a superficial level. When important decisions had to be made, the SMT generally controlled the decision-making process, they often made decisions in a contextual vacuum and they excluded teachers from the process. Dialogic space, conceptualised by Rule (2004) as encompassing movement, spaciousness and freedom, was largely absent at a whole school level. Little space was created for teachers to find their voice, critically reflect on the particular situation and become agents in the leadership practice at a school level. Where teachers were involved in whole school development practices, these were largely management functions which sought to maintain rather than challenge the status quo. In making this the point, I am not suggesting that management activities are unimportant. On the contrary, they are critically important to the basic functioning of a school, and an unfortunate legacy of our racially polarised past is the breakdown of the management function in many of our mainstream schools. And so, like Christie, I acknowledge that there is a need, particularly in our mainstream schools, to establish 'proper and effective management systems and structures with clear procedures and clear lines of authority, powers, responsibility and accountability' (Christie, 1998, p. 291). If this need is not met, learners will remain discriminated against through the neglect of managerial matters of schooling, such as ‘teachers, textbooks and time’ (Soudien, 2007, p. 189).

Nevertheless, whilst management processes are indeed important, equally important are leadership processes of SMT members and teachers alike which seek to challenge the status quo in order to enable change and social inclusion. However, as a legacy of apartheid, the concept of ‘teacher leadership’ was understood in a ‘common sense’ way by educators in my studies who, in many instances, regarded it as an individual rather than a collective activity. Theirs was a ‘restricted’ understanding of teacher leadership (Harris & Muijs, 2005), primarily because the cultural changes required to support the leadership of teachers were not in place in their schools. Thus, the findings of my studies resonated with those of Wasley in the United States who established that the teachers in her study ‘had not given much thought to teacher leadership, how it might be defined, or what it might look like in practice’ (1991, p. 145). As a consequence of this limited understanding of teacher leadership, the educators in my studies exhibited no real insights into the transformative power of teacher leadership and were largely ignorant of their potential to transform schools into socially just and inclusive places of teaching and learning.

Concluding Comments

South Africa’s past has influenced the present. A consequence of the apartheid era is a legacy of ‘unfreedoms’ (Sen, 1999 in Porteus, 2008) including rampant poverty, high levels of illiteracy and unemployment, the prevalence of HIV/AIDS as well as gender violence and discrimination. These ‘unfreedoms’ pervade our country and impact directly on the schooling system resulting in learners with HIV/AIDS-related illnesses, malnourished and hungry learners, illiterate and uninvolved parents, under-resourced schools with weak and unaccountable authority structures as well as demotivated teachers. The aim of post-apartheid schooling has been to reduce the cycle of exclusion and marginalisation of learners, parents and educators in our country, and, to this end, schools have been structurally democratised through the introduction of committees such as the School Management Team (SMT), the School Governing Body (SGB) and the Representative Council of Learners (RCL). Yet, despite this structural democratisation, the extensive range of ‘unfreedoms’ have proved overwhelming and have undermined the capacity for leadership and positive social action.

Thus, structural change alone is insufficient, and I argue along with Harris and Muijs that the answer to improving schools ‘resides in cultural rather than structural change and in the expansion rather than the reduction of teacher ingenuity and innovation’ (2005, p. 2). Whilst the process of instituting structural changes in schools is relatively simple, changing the substance of schools, their cultures, is far more complex. Cultural change in schools, I argue, requires leadership, lots of it, but not a conceptualisation of leadership informed by the bureaucratic-managerial tradition.

In direct contrast, it requires leadership conceptualised through a critical lens which enables social inclusion and which makes 'conscious, deliberate use of differences in social class, gender, age, ability, race, and interests as resources for learning' (Barth, 1990, p. 168).

From a critical perspective then, we can reimagine the field of education in SA as a site of struggle – a struggle for the right to lead in a quest for a less discriminatory and more equally just South African society. And it is the educators who are called to lead, whether they are SMT members or teachers. This requires of educators a basic activist instinct, an instinct which, for many, has lain dormant since the waves of resistance in schools during the 1970s and 1980s. Taking up an activist role is seldom easy, and it necessitates a level of human agency to challenge the status quo in order to facilitate change and social inclusion. This activist role is incorporated in the notion of transformative leadership which is about influential, creative leadership that increases the opportunities for all people, making it possible for them to 'contribute their talents, experience and skills to create a successful, prosperous democracy' (Ramphele, 2008, p. 295). As transformative leaders, educators are challenged not only to transform their personal understandings of themselves and their colleagues but also to 'lay the groundwork for challenging social inequities and inequalities' (Shields, 2006, p. 77).

Whilst this is a daunting challenge indeed given the levels of educator compliance and conservatism within our country, my studies have indicated that teacher leadership is beginning to emerge in some mainstream schools. Where an enabling school environment is created, some teachers are able to identify and understand the problems they face, and they are then able to work collaboratively with colleagues to 'change the situations that caused these problems' (Smyth, 1989, p. 191). These teachers, in moving from a position of subordination and reliance to one of becoming reflexive agents into their own and each other's practices, become teacher leaders. And it is these teacher leaders who are the hope for the future. It is these teacher leaders who will lead the change process in their schools, and it is these teacher leaders who will nurture the next generation of teacher leaders.

Whilst there is little doubt that the process will be slow, the challenge is to awaken the leadership potential of all educators in our country, SMT members and teachers alike. If we are able to draw on the untapped leadership potential in our schools and nurture this potential, the opportunity to transform our schools into socially just and inclusive places of teaching and learning will become a reality. This requires that educators begin to recognise their own agency and the agency of others and to draw on this 'human consciousness of powerfulness' (Porteus, 2008, p. 13). However, if educators elect to remain in their present state of disempowerment and collude to maintain the status quo in schools, the social injustices of the South African schooling system will be perpetuated for years to come.

In conclusion, I wonder whether there are international lessons to be learnt from my research journey. Perhaps there are three? First, as researchers in the field of Education Leadership, we should not lose sight of the political-historical tradition of leadership research as we seek best practices. Second, particularly for other African nations, we should acknowledge and confront discriminatory practices, particularly those related to authoritarianism, gender and HIV/AIDS in the quest for a socially just and inclusive society. The final lesson is to hold on to hope for whilst people are involved in the education project, there is always the possibility of agency and therefore the possibility of change.

Appendix

Table 29.1 The eight chronicles informing the doctoral study

Chronicle 1 Emerging voices on teacher leadership: Some South African views Published *Educational Management, Administration and Leadership*, 34(4), 2006 STUDY 1, Semester 1, 2004
Chronicle 2 Teacher leadership: Gendered responses and interpretations Published *Agenda,* No. 65, 2005 STUDY 2, Semester 1, 2005
Chronicle 3 'In this culture there is no such talk': Monologic spaces, paralysed leadership and HIV/AIDS Published *South African Journal of Education Leadership and Management,* 1(1), 2008 STUDY 3, Semester 2, 2005 – Semester 1, 2006 (Co-author: Praveen Jugmohan)
Chronicle 4 Towards a conceptual understanding of education leadership: Place, space and practices Published *Education as Change,* 13(1), 2009 STUDY 3, Semester 2, 2005 – Semester 1, 2006
Chronicle 5 'We did not put our pieces together': Exploring a professional development initiative through a distributed leadership lens Published *Journal of Education,* No. 44, 2008 STUDY 4, Semester 2, 2006 – Semester 1, 2007
Chronicle 6 Passing the buck: This is not teacher leadership! Published *Perspectives in Education,* 27(3), 2009 STUDY 5, Semester 1 & 2, 2006 (Co-author: Hitashi Singh)
Chronicle 7 Teacher leadership: A survey analysis of KwaZulu-Natal teachers' perceptions Published in *South African Journal of Education,* Vol. 30, 2010 STUDY 6, Semester 1 & 2, 2008 Co-authors: Karen Gardner, FarhanaKajee, Ronnie Moodley and SharilaSomaroo
Chronicle 8 Distributing school leadership for social justice: Finding the courage to lead inclusively and transformatively Published *Educating for Social Justice and Inclusion: Pathways and Transitions,* 2008 Conceptual Book Chapter

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Part IV
Advocacy/Advocates for Social Justice

Chapter 30
Community Leadership: Seeking Social Justice While Re-creating Public Schools in Post-Katrina New Orleans

Brian R. Beabout

Purpose

Discussions of social justice in educational leadership generally rely on a shared assumption of a human world characterized by inequality of wealth, health, education, housing, economic opportunity, and agency or self-determination (Beachum, 2008). Those who witnessed the human costs of the 2005 flooding of New Orleans need little reminder of this (Brinkley, 2007; Ladson-Billings, 2006). Seeing shocking inequity and being dissatisfied, the advocate for social justice naturally expresses a desire for change. The advocate can critique the current (or historical) state of affairs (Katz, 1975; McLaren, 1999; Willis, 1977; Zinn, 2003) or articulate an expression of a preferred future (Freire, 2000; Shor, 1987; Wink, 2000). In either case, conceptions of social justice in an unjust world are of limited use unless they are explicitly connected to theories of organizational and social change. Following Bogotch (2008), concerns for social justice cannot be truly developed in practice until the reverse is also true: our conceptions of change must become tied to social justice. And while the process of change is never simple (Fullan, 2001a, 2001b), change that challenges asymmetrical social relations between groups is certain to face organized and powerful opposition (Oakes & Lipton, 2002). Leadership in the service of social justice then must be well organized and creative in seeking and wielding power.

In the context of education, leadership for social justice faces a central paradox in which leaders (often employees of the state) seek to improve social conditions that have usually been created or sustained by the state itself (Beabout, 2008). Such change smells of revolution. And revolutionary change (rather than *evolutionary* change) is important for thinking about the intersections of leadership, social justice,

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and educational change. Economist Milton Friedman has stated that “only a crisis- actual or perceived- produces real change” (1962, p. ix). More recently, US Secretary of Education Arne Duncan has offered his policy of crisis creation via reconstitution, school closure, and school takeovers as an approach to reform in persistently failing schools (Harris, 2010). Both Friedman and Duncan exemplify the use of crisis to create change that would have been unfeasible in more stable social contexts (see Klein, 2007). What remains unclear is if this a set of policies that can dislodge entrenched modes of apartheid schooling for marginalized youth, or if it is the educational equivalent of slash-and-burn agriculture in which tremendous amounts of resources are wasted and sustainability threatened in order to get one or two good harvests before moving on. This chapter will offer support for the position that educational leadership for social justice *must* prioritize community engagement, indeed community *leadership*, if it is to be both sustainable and just. To use Freire’s (2000, p. 180) terms, we should seek educational leaders capable of *cultural synthesis* rather than *cultural invasion*. Cultural synthesis emphasizes the agency and wisdom of both leaders and followers, rather than transplanting the ideologies and values of the leaders on to followers. With current educational policies in the USA that serve to sort poor and nonwhite students into their own racially segregated schools (Frankenberg, Siegel-Hawley, & Wang, 2011), this ability to engage in cultural synthesis becomes an increasingly important leadership skill. Educated, middle-class school leaders must find ways to authentically engage with low-income communities of color. This leadership must be characterized by democratic engagement rather than autocracy. This slow, messy work of relationship building with diverse constituencies is where our best hopes for true revolution lie.

I have intentionally foregrounded the concepts of *crisis*, *change*, and *power* here in order to draw attention to specific aspects of the market-oriented charter school reform strategies that have unfolded in the tumultuous 7 years since Hurricane Katrina and the attendant levee failures forever changed my city and its public school system. I will refer to this approach as *expertism*, and it is characterized by the movement towards appointed, rather than elected district leadership, strict adherence to test scores as the correct measure of school quality, and the vision of districts as *portfolio managers* rather than *operators* of public schools (Beabout, 2011; Bulkley, Henig, & Levin, 2010). The discussion of *community leadership* relates to the story of the reopening of the Morris Jeff Community School in New Orleans in this context of portfolio management and *expertism*. Quite uniquely, the Morris Jeff school was created from a community-organizing paradigm (Shirley, 1997; Warren, 2005) and involved a group of parents, educators, and neighbors coming together to create a school where there was once only a storm-damaged building.

The discussion utilizes the *ethic of community* (Furman, 2004; Furman & Shields, 2003) as it attempts to answer the questions: *who shall lead our schools to become more just institutions*, and *what forms of leadership might they use*? What follows is an extensive history of the creation of the Morris Jeff school as a case of *community leadership* in urban schools. Implications for the connection of social justice to educational change are discussed as well as lessons that this case has to teach about the definitions of social justice in an educational arena dominated by a politically constrained conception of what constitutes a "good school" (Eisner, 1991; Rothstein, Jacobsen, & Wilder, 2008).

The Ethic of Community as an Interpretive Frame

Scholars have developed the *ethic of community* (Furman, 2004) as an addition to other ethical paradigms in the field of educational administration, including the ethic of *care*, the ethic of *critique*, and the ethic of the *profession*. As a set of moral commitments or obligations, the ethic of community consists of commitments to practicing shared leadership, dialogue, and collaborative work. This set of practices is informed by the postmodern conceptions of community as impermanent, changing, diverse, and unequal.

Shields and Seltzer (1997) contribute the ideas of a *moral community*, *a community of difference*, and *a community of dialogue* that emphasize the nonnormative and fractured nature of schools when viewed as communities. Their conception pushes us beyond our often false assumption of shared values, to what we find in our modern lives: communities characterized by enduring differences, by conflicting values, and by imperfect communication (Tierney, 1993). Rather than viewing modern life as the end of community, they advocate a reconceptualization that views community as a set of processes through which diverse groups of people can move towards dialogue, trust, and collective decision-making, even in the face of persistent difference. This collective existence invokes the long history of democratic philosophy in education (Dewey, 1916; Green, 1999; Maxcy, 1995; Strike, 1999). Particularly significant for the discussion here are Strike's notions of *thin democracy* characterized by procedural, majority-rules mindsets and *thick democracy* characterized by dialogue and a commitment to inclusion despite persistent differences between people. The ethic of community also urges us to look for these commitments and practices within schools, as they are connected to some of the more established markers of successful schools: teacher collegiality, student engagement, and student achievement (Furman, 2004).

This description of the ethic of community should generate significant dissonance for the reader well versed in the current school reform policies in many Western nations, as exemplified by the testing and accountability policies embedded in the *No Child Left Behind Act* and the *Race to the Top* initiative of the last two presidential administrations in the USA. Furman (2003a, p. 6) offers the following indictment of much of the person-centered leadership implicit in much current reform policy:

> Essentially, these arguments for a democratic communal approach to social justice are saying that social justice cannot be realized given the status quo of hierarchical relationships and communication patterns in schools, the assumption that moral leadership is the purview of "heroic" leaders in administrative positions, and the dearth of opportunities for "full participation and open inquiry."

Notable here is that much of the hierarchical, hero-based reforms of the current era are framed in social justice language, and the mantra that "education is the civil rights issue of our time" has been used to remove schools from local control, dismiss veteran teachers, and allow state takeover of schools in communities of color. The ethic of community forces me to ask of these policies, *can socially just ends be served by autocratic means*? The answer, of course, depends on our definition of socially just. If closing the racial achievement gap on state examinations is social justice, then perhaps. If our definition hinges on marginalized communities gaining some agency in the public institutions that serve them, probably not.

In addition to the focus on community as practices emphasized by Furman (2003a), I also wish to emphasize the role of inclusion. While one might be satisfied to build exemplary communitarian practices among a school's staff, leadership, and students, those fully embracing the ethic of community emphasize inclusion of parents, community members, and other persons over whom the school administration exerts less formal control. Drawing boundaries around the communitarian *us* to keep out the unpleasant *them* certainly makes a farce of any meaningful sense of community in the diverse school communities of today. This natural human tendency to fudge on inclusion for the sake of consensus is the *dark side* of community (Noddings, 1995) and plays significantly into the following discussion on the rebuilding of schools in post-Katrina New Orleans. Significant consideration should be given to conceptions of the administrator as a *representative* or *leader of* the broader geographic community served by the school (Khalifa, 2012). This definition greatly expands the definition of who is considered a stakeholder in public schools to include community members with (or without) formal affiliations to the school.

The ideas presented above (community as a set of practices, the moral community, community of difference, community of dialogue, community as vehicle for social justice, and the dark side of community) serve as the interpretive lenses for the case of community leadership. These ideas will be identified where present and extended where necessary to aid our understanding of the highly complex interactions that are embedded in approaches to change in urban schools.

The Creation of the Morris Jeff Community School[1]

The Morris F.X. Jeff Elementary school building is located at 800 N. Rendon St. in the Faubourg St. John neighborhood of New Orleans.[2] In typical New Orleans fashion, the school was tucked away in the middle of a residential neighborhood, a few blocks from both the palatial, high-ground homes on Ursulines and Esplanade

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[1] The narrative constructed here is based on a combination of personal experiences, personal correspondence, and media reports about the creation of the Morris Jeff Community School. I have been involved with the school as a board member, parent, and classroom volunteer since December 2008.

[2] As this chapter goes to press, the vacant and storm-damaged building was recently sold at auction by the Orleans Parish School Board to CCNO Development for $980,000. It is likely to be converted to multifamily housing.

Avenues, as well as a few blocks from some of the city's most violence-plagued streets. Built in 1904, the school originally opened under the name McDonough #31. John McDonough (1779–1850) was a businessman and entrepreneur who left considerable fortunes to support public school construction in both his native Baltimore and his adopted home of New Orleans. School district directories show that the school regularly served between 400 and 600 students with 10–22 teachers. The school was a *coeducational whites-only* elementary school until the New Orleans schools were desegregated after 1960 (Inger, 1969; McKenzie, 2009). The school, like most other non-magnet schools, experienced a rapid shift in student demographics, and McDonough #31 rapidly became a predominantly low-income and African-American elementary school after 1960 (DeVore & Logsdon, 1991).

In 1995, the principal of the school coordinated a successful campaign to change the name from McDonough #31 to Morris F.X. Jeff Elementary School to honor the revered educator and city recreation department leader who had passed away in 1993 (Frazier, 1995). A number of schools opted to change their names during this period in an effort to eliminate the names of former slave owners from the names of schools in the predominantly African-American school district.

The more recent history of the school is documented in part by the state's online data reporting on public schools (see http://www.doe.state.la.us/data/school_report_cards.aspx). The state has accountability data on the school dating from 1998 to 2005 which shows a relatively stable school, with just over 300 students, nearly 100 % African-American, with 98 % receiving free or reduced-price lunches. Class sizes were nearly all below 25 students, and the school was never labeled as *persistently* dangerous, one of the indicators used by the state's report card system. Student attendance was generally near 95 %. Student academic performance lagged. The majority of students scored at the *unsatisfactory* or *approaching basic* levels on state testing and around the 20th percentile nationally on the norm-referenced Iowa Tests of Basic Skills. The school was slightly below average when compared with other public schools in New Orleans, but far from the bottom.

As a public school in the accountability era, it was an African-American institution serving low-income families that enjoyed high regard as a safe and caring place for children. Deep ties between the African-American community and the school are evidenced by its relationship with the nearby Zulu Social Aid & Pleasure Club and by the photos of parents and children posing with sequin-adorned Mardi Gras Indians visible on a plexiglass-covered bulletin board outside the school (*Morris FX Jeff Elementary School*, 2008).

Evacuation and Neighbors Return

Like most other public schools in New Orleans, Morris F.X. Jeff Elementary was closed in 2005 after Hurricane Katrina struck and the state legislature seized the opportunity to give control of the much-maligned New Orleans Public Schools to the state-run Recovery School District, run by a state-appointed superintendent (Beabout, 2010; Perry & Schwam-Baird, 2010). And as the neighborhood around the school began to rebuild, the handsome school building, spared by the worst of the storm because of its relatively high elevation and a serendipitous roof replacement shortly before Katrina, just sat there, windows and doors left open by storm survivors awaiting rescue or by looters (*Morris FX Jeff Elementary School*, 2008). As the neighborhood was repopulated in the months after the storm and the building continued to sit there, an unsecured eyesore, people began talking. Neighbor Jenny Bagert said, "We looked at the school over our back fence every day. I began to ask myself where the students from our neighborhood were supposed to go to school" (Himelstein, 2009, p. 19).

In March 2007, cleanup contractors began working on the Morris F.X. Jeff site. The district's policy was to declare all items inside of schools as *storm debris* and throw them away, even items on unflooded upper floors. While concerns about mold spores and potential lawsuits were a common official refrain, some have challenged this approach as wasteful and overly cautious, as tens of millions of dollars in equipment was discarded from schools across the city (Ritea, 2006). Neighbors who saw this at Morris Jeff were disappointed that the first significant official attention given to their abandoned public school was this wholesale filling of dumpsters with what appeared to be useful books and supplies. A neighborhood blogger reported that one onlooker watching books and computers being tossed out of second-story windows said, "You know somebody could have used it" (*N.O. school* "*cleanup*" = "*throwout*", 2007). Another neighbor responded by entering the abandoned building and retrieving books for the neighborhood kids to take home. Regardless of the soundness of this cleanup decision, something about the sight of work crews coming unannounced into the neighborhood and removing scarce supplies inspired a reaction.

Much of the critique of post-Katrina educational change has been that a self-serving group of well-funded and out-of-town charter school advocates has moved in to replace local educators, thus removing any sense of community that may have existed under the struggling pre-storm system (see Buras, 2010; Klein, 2007; Perry, 2007). The micro-narrative of Morris Jeff's neighbors parallels the broader macro-narrative in which the post-storm reforms were perceived as being done *to* a community rather than *with* a community. The Morris Jeff neighbors understandably defined the school as theirs. It was across the street from their houses, and there was a tremendous distrust of governmental authorities that emerged from Katrina and the catastrophic failures of the Army Corps of Engineers. There was a feeling that something as important as the neighborhood school could not be trusted to distant authorities. And this feeling was about to grow stronger.

A Community Engages

State superintendent Paul Pastorek hired Paul Vallas in the summer of 2007 to lead the state-run RSD, which directly operated or turned over to charter operators all schools in the state deemed failing according to the state's accountability policies.

Nearly all of the public schools in New Orleans, including Morris F.X. Jeff, were moved into this district following a change in state policy in November 2005, explicitly intended to wrest control of New Orleans schools from the locally elected school board.

A polarizing figure, Vallas was a former superintendent in Chicago and Philadelphia after serving as the budget director for the city of Chicago. He had supported charter school expansion and strict test-based accountability in both previous school posts. The RSD, faced with having to decide which schools to open, which to tear down, and which to prepare for renovations, began holding public meetings in the winter of 2007–2008 in order to gather public input for the school facilities master plan. During a January 15, 2008 meeting at the Crossman School, about a mile from the Morris Jeff site, several audience members posed questions about the Morris Jeff building. After noticing their common interest in the building, they gathered after the meeting to talk about their thoughts for the school.

A second RSD facilities meeting was planned Thursday, February 28, and the group decided to take action to impress on the committee that they wanted their school opened. A neighborhood meeting was called by Broderick Bagert, Jr., and his wife Celeste for the Saturday prior to the meeting (*This is the way we save our school*, 2008). The purpose of the meeting was to gather input and prepare their message for the master plan committee. In full-group and in breakout teams, they discussed some unified concerns that included renovating and reopening the Morris Jeff school. The group organized a neighborhood petition drive, had t-shirts printed, and coordinated rides to the meeting that next Thursday. The group, calling itself *Neighbors for Morris F.X. Jeff School*, included a broad cross section of residents in the diverse neighborhood including a former principal and teacher at the pre-storm school, alumni from the school, citizens committed to seeing the historic building preserved, and young families interested in having the neighborhood school reopened. They planned to have survey data about community wishes, a petition of signatures, and a mobilized group of neighbors to help make their case.

Taking Direct Action

In the meeting at the Medard Nelson school on February 28, the RSD's planning board put forth their recommendation that Morris Jeff be "repurposed" and that elementary school children be sent to school elsewhere. Leaders from the Morris Jeff group rose to speak at the meeting and argued for their school's reopening. The board informed the large Morris Jeff contingent, which took up ½ the seats in the school cafeteria, that no final decisions had yet been made, and since community input was a key factor in the board's decision-making, their request would be considered. The group posed for an all-smiles photo in the back of the room following the meeting. The group got another 25 people to attend a meeting of the state's education board on June 18 and presented the results of their community survey of over 500 families and their demographic analysis demonstrating the need for more elementary school seats in the Bayou St. John and Mid-City neighborhoods. Neighborhood resident Shana Sassoon concluded that "Our need for a quality school is undeniable" (Simon, 2008a, n/p). The group had made their case and waited for the release of the RSD's facilities master plan.

The RSD's August 2008 facilities master plan included a "New Jeff site at Easton Park" in phase 2 (of 6) of the rebuilding process. This suggested the district wanted to keep the "repurpose" designation on the original Rendon St. site and build a new school building at a nearby park in the next 5–7 years. On one hand, the group had achieved a small victory: convincing the board that an additional school was needed in their neighborhood. On the other hand, the historic 1903 building that had been the source of their concerns was still being left out of the rebuilding. Even worse, the price of their new school might mean the loss of one of the few green spaces in the densely populated neighborhood. The city-owned Easton Park is home to a playground and a youth football team and hosts high school softball games each spring. Another surprise was the call for the nearby *John Dibert* school to be closed, which was currently serving over 300 students, many from the areas surrounding the shuttered Morris Jeff.

Neighbors for Morris F.X. Jeff called a press conference at the Rendon St. site on the morning of Friday, August 22, 2008, to voice its critique of the RSD's master plan. This included the lack of responsiveness to community input in the master plan and the fears that closing so many schools in one neighborhood would force children into unnecessarily long bus rides. Broderick Bagert, Jr., criticized the current treatment of the neighborhood in the plan harshly, "this is an unfunded plan to take a neighborhood park and to close three neighborhood schools" (Carr, 2008, n/p).

On Thursday, September 18, the group joined approximately 150 citizens at a public hearing on the master plan held at McDonough #35 high school. The group repeated its call for a new Morris Jeff school to be moved into the first rebuilding phase and called out the board for its lackluster performance in demographic analysis. Bagert again had sharp words warning that the facilities master plan could "go down in history as a colossal embarrassment and one of the most unsuccessful failures of planning in our community" if not revised (Simon, 2008b, n/p). Their arguments at the McDonough #35 meeting earned them an invitation to meet with RSD director of operations, Karen Burke.

As the group emerged from the fall of 2008 with the attention of the RSD officials as an active community force, two things became clear to the members: (1) they were not going to be successful in their bid to reopen the old Rendon St. site, as the state's refusal was based on state minimum size requirements, and (2) they wanted to continue organizing the neighborhood and there was a possibility that a *new* Morris Jeff school could be opened on a different site, with significant community leadership. The group held an open community meeting at the Bibleway Missionary Baptist Church, 2 blocks from the school, on Thursday December 11, 2008, in hopes of expanding community understanding and participation in the group's efforts. Led by a self-titled *steering committee* and community organizers Bagert and Aesha Rasheed, the meeting provided information on the history of the group, and attendees participated in several small group discussions on topics such as curriculum, teachers, and leadership for the new proposed school. In groups of 5–7, participants talked about their experiences in schools as both students and parents, as well as their ideas for an excellent neighborhood school. Based on this meeting and subsequent information gathering events drawing on hundreds of community members, some emerging core values became evident including *student diversity*, *open-access*, *community-centered*, and *high-quality learning*.

Becoming Formalized

From here, the group began transforming itself from a group of concerned neighbors to a governing body preparing to open a public school. The e-mail address that the group used on its materials changed from savemorrisjeff@gmail.com to morrisjeffschool@gmail.com. This is indicative of a shift of attention away from *saving* from the old building towards the possibility of *designing* something new. The group formed several standing committees that would do the majority of the near-term work: principal selection, curriculum research, finance, fundraising, and parent/community outreach.

The principal selection committee placed online advertisements beginning in December 2008 and began meeting to review candidates in January 2009. All told, the group received almost 50 applications for its founding principal position. The committee included a handful of neighbors of the old school building, a high school teacher, a college professor, an insurance claims manager, a day-care administrator, and a community organizer.

The curriculum research committee began meeting in January and visited a number of schools to get a sense of the curriculum offerings at successful schools that had diverse student bodies. Their work was important in articulating the group's emerging commitments to inquiry-based learning and foreign language instruction. They visited the highly regarded (though selective) Laboratory School at Louisiana State University, the International School of Louisiana located in New Orleans, and several other local schools.

The finance team opened a bank account and set up accounting procedures that would get the group operating smoothly for its first tax return and first year of board meetings. Initially, the group collected donations through the Faubourg St. John Neighborhood Association, which had a preexisting 501c3 status. With a relatively small amount of money going in and out over the school's planning year, getting comfortable with accounting procedures was important as the amount of money, and public scrutiny, would increase significantly once it was operating with students and staff.

The fundraising team collected several thousand dollars in initial contributions from active steering committee members. The group also won a grant for a governance retreat from *New Schools for New Orleans*, a charter school support organization founded post-Katrina. Plans were undertaken for an initial Community Gala that took place in August 2009 at the Zulu Social Aid & Pleasure Club, located a few blocks from the still-shuttered Morris Jeff building. The event, featuring live music and food donations from local restaurants, raised over $20,000 to cover training for the school principal and costs for the initial marketing of the school (brochures, website, banners, and yard signs).

The community engagement team recruited parents and volunteers at community events and block parties. An Easter Egg Hunt on April 11, 2009, helped to ensure that the parents of school-aged children were aware that the school, which still had not been assigned to a building, would be opening in the fall of 2010. Members staffed booths at community events such as the Urban League's School Expo, the International Day of the Child in Audubon Park, and the Fortier Park Festival. They also organized community walks in the spring of 2010 and organized house meetings to hear from interested families.

The full steering committee was still in place and held regular meetings to coordinate committee activity. The steering committee drafted bylaws to become a nonprofit corporation and submitted them to the state, receiving approval on February 13, 2009 (Louisiana Secretary of State, 2011). That same week, on February 12, Paul Vallas and Karen Burke from the RSD failed to show up to an agreed upon meeting with the steering committee to plan for the hiring of a principal and the governance plan for the proposed new school. At the time, the group was considering entering into a memorandum of understanding (MOU) with the RSD whereby the RSD would retain legal authority for the school but would cede responsibility for curriculum and personnel decisions to the community board and the principal they hired and supervised. The group had strong reservations about joining the *charter movement* that was sweeping New Orleans at the time, not sharing in its acceptance of highly segregated public schools or in its broad condemnation of all things related to the pre-Katrina system. Vallas pushed the charter option to the group, and it was perhaps a bit of intentional rebellion that prompted the group to continue pushing back against Vallas, a man who usually got what he wanted.

While the option of entering into an MOU was eventually taken off the table by the RSD, the distrust sewn by that missed meeting and several other uneasy interactions with the RSD helped to solidify the group's decision to keep the RSD at a distance and apply to the state for a charter. This process included a document review and an in-person interview with the National Association of Charter School Authorizers (NACSA), but if successful, the group could elect its own board, receive state funds directly, and not be under the thumb of the RSD. As long as their fiscal and academic performance was strong, the school would be relatively free to pursue its mission.

On May 29, 2009, several members attended a workshop held by the state department of education for prospective charter applicants, and the steering committee submitted a letter of intent prior to the state's deadline of July 10. The charter was written during the summer of 2009 and primarily was done electronically as many team members were in and out of the city during the summer holidays. The 248-page charter application document was submitted to the state on August 21.

A Formal Leader

The other significant event of the summer of 2009 was the hiring of the school principal, Patricia Perkins, to begin the school's planning year. The steering committee and the smaller, newly created board, whose role was formalized in the articles of incorporation, had settled on three finalist candidates (out of almost 50 applicants) by the end of March and conducted interviews in late April and early May in donated board room space at the New Orleans Museum of Art. Approximately 30 community members participated in some part of the interview process, which lasted a grueling 8 hours per candidate and was comprised of a prepared professional development session, small group meals with steering committee members, and separate meetings with parents, educators, and the full steering committee. All this was done, however, without any source of steady funding, as negotiations were still underway with the RSD for the source of the founding principal's planning-year salary. The group expected this to come from a combination of RSD funding and independent fundraising.

On Thursday, May 28, 2009, the principal selection committee met to make a decision on the two finalist candidates for their founding principal. The group entered into a long discussion that involved tears and long pauses. There was a weight to this meeting that had not existed previously. Previous meetings entailed strategizing, discovering shared values, and were pervaded by a sense of consensus. This meeting was spiked with sense of division. In the end, the votes were split between two candidates, and the steering committee votes split along racial lines.

As the votes were called by hand, the group realized that a division existed in the group that hadn't been visible before. Within a few seconds of the vote, several group members, from both the "winning" side and the "losing" side, commented that they were uncomfortable moving forward with the group split this way. It was decided that they would take a few days to think about the choice and to collect additional information on each candidate through personal contacts. The group met again in 4 days and, on the advice from a steering committee member with a background in Quaker education, decided to have the members talk about what they had learned and what they were feeling about the candidates rather than proceeding to a quick vote that could potentially be divisive. The group, numbering over 20, sat in a big circle in a member's house on Dumaine St. and shared new information and personal reflections on the candidates. After about an hour, it became clear that there was much more support for Ms. Patricia Perkins, and those in opposition decided not to stand in the way. Members were drawn to her experience in a high-performing school in the city, her strong sense of curricular knowledge, and an overwhelming number of positive references from colleagues.

This decision-making process is a good example of the "commitment to communal processes" emphasized by Furman (2004). Not only did voting and dialogue get used, but group reflections led to an alternative to majority-rules voting that maintained some level of group consensus in the face of persistent differences. In alignment with Shields and Seltzer's (1997) assumptions about postmodern community, this *community of difference* negotiated internal conflict and came out altered, but intact, on the other side. Final negotiations with Patricia Perkins took place, and she began as the school's first employee on July 1, 2009. The group had survived its first crisis, and time would tell how successfully it had managed it. Shortly after being hired, Perkins was interviewed by a community paper and stated:

> My goal is to see a community of students, parents and neighbors. The students will be challenged, held to high expectations. They will see learning as a joy as well as a challenge in their student life. (Himelstein, 2009, p. 19)

Capacity Building

The fundraising team held its first major fundraiser at the Zulu Social Aid & Pleasure Club on August 19, 2009 (Himelstein, 2009). Up to that point, the group had used small donations (totaling several thousand dollars) from individual members to pay for things. As the group prepared to officially enter its planning year, expected additional costs included teacher and student recruitment, principal school visits, and marketing. The Community Gala at the Zulu club was an opportunity to get the word out about the school, expand its network of supporters, as well as to raise money. As part of the preparation for the event, steering committee members hosted house meetings where strategies for fundraising were discussed and sample solicitation letters were shared. Each member was asked to submit a list of 25 names to the Gala coordinator, from which the master invitation list would be compiled. Those with fundraising experience led the training, and first time fundraisers talked about being uncomfortable asking their friends and family for money. Trainers acknowledged their feelings and role-played scenarios in which they asked neighbors to support the school or asked local businesses to support our event.

In addition to a monetary goal of raising at least $20,000 at the event (which it met), they set a goal of 300 donors. This served to encourage members without a lot of wealthy contacts to make significant contribution towards the goals of the event. On one level, the group was raising money to prepare the school's opening. But on the level of social capital, as used by Bourdieu (1986), the group was building its capacity to exercise influence within the broader social and political systems it was a part of. While the community already included some individuals with fundraising experience, it was not shared in several important ways. First, those lacking fundraising experience didn't necessarily know that their neighbors had those skills. In a city deeply divided by lines of race and social class, this comes as little surprise. Second, those lacking fundraising experience of Morris Jeff community members was not shared prior this effort because there was not imminent reason to do so. Those with fundraising skills used them for their jobs with nonprofit organizations or other community entities but, for the most part, had never had reason to share their skills with their neighbors. The creation of the Morris Jeff Community School gave them this reason. In this sense, the school was the beneficiary of the fundraising, but so was the community itself, for it possessed expanded skills that it didn't have before the event. This fundraising example highlights a key element of community leadership: a commitment to not only educating children but building the skills of their families and neighbors so that self-determination and advocacy are more possible. The broad distribution of skills supports the community by creating a dense support network around the public school. It also benefits the school and it's students by having an increasingly skilled and increasingly organized group of advocates fighting the inevitable battles that a new organization has to fight: from raising funds, to securing facilities, to engaging in public relations activities. As of this writing, the school and its newly minted fundraisers have raised more than $155,000 in grassroots fundraising, from more than 500 individual donors, over $300,000 in private foundation grants, as well as a 3-year, $600,000 Public Charter School Program grant from the US Department of Education. While this is a far cry from the totals amassed by some of the other charter schools in New Orleans, this money has been raised by public school parents and public school supporters, and every dollar raised signifies an uptick in public faith in the historically unsupported public school system.

The School Today and Challenges Ahead

As of the 2012–2013 school year, the Morris Jeff Community School serves 330 pre-K through 4th graders and has maintained the notable racial balance it achieved in its first year of operation (Pope, 2010). It has kept a stable staff while adding teachers as the school grows and new administrative positions are created. As a relatively small school, having enough support staff to meet both the academic and social/emotional needs of students is a challenge.

A second challenge is continuing to negotiate as the school facilities master plan is implemented and the city begins spending the nearly $1.8 billion on school construction money that was allocated by the Federal Emergency Management Agency in order to rebuild Katrina-damaged school buildings. While successful organizing among parents and the broader mid-city community earned the school a good location at the recently demolished Fisk-Howard school, less than a mile from the old Morris Jeff building, the new building is only in the design phases and supervising the construction (through Fall 2014), as well as maintaining their temporary school site will remain time-consuming for the short term.

A final challenge the school faces is leveraging leadership from the low-income families the school serves. The school has a racially and socioeconomically diverse student body and a racially diverse staff and governing board. But, as was remarked to the group during a 2010 leadership retreat, this was a racially diverse group of adult leaders with "more college degrees in the room than people." Developing shared leadership across these lines of social class is a goal that the school holds for itself, but has not yet managed to achieve. This is in line with the experiences other community-oriented charter schools with social justice missions, like the Camino Nuevo schools in Los Angeles (Warren, 2005). What makes the problem at Morris Jeff particularly unique is the presence of a wide range of socioeconomic levels among the parent population. While Warren cites Camino Nuevo for having relatively excellent parental *participation*, but lackluster parental *leadership*, they were dealing with an almost uniformly low-income, Latino parent pool. At Morris Jeff, there is excellent parent participation *and* leadership, but while the participation includes parents of many income levels, parent leadership has tended to come from the more educated and middle-class families of all races.

Developing leadership among low-income families is an important and challenging goal, so it comes as little surprise that schools have underperformed in this area. Even these rare schools that make parent leadership a stated goal, barriers to this participation are well documented (Davis-Kean & Eccles, 2005; Hoover-Dempsey & Sandler, 1997) and include factors on the parents' side as well as the school's side of the relationship. Moving from lower-level participation (lunch duty, chaperoning field trips) to higher-level leadership (parent-led advocacy, fundraising, participating in curriculum and personnel decisions) presents another level of challenges. It is clear that continued persistent engagement and capacity development with low-income parents are crucial avenues for developing this leadership. Perhaps most important to the school's future success in leveraging leadership from lower-income parents will be to continue asking, inviting, and expecting leadership from these families. Having a full stable of middle-class parents will raise the temptation to invite low-SES parents less vigorously, but to do so would be a violation of some of the school's founding premises.

Morris Jeff Community School as an Example of Community Leadership

This story of the creation of the Morris Jeff Community School gives a picture of a school created by a community. Warren (2005) articulately outlines a typology of relationships between community-based organizations (CBOs) and public schools: full-service schools, CBO sponsorship of new charter schools, and school-community organizing. All of these approaches involve creating new school-community relationships via preexisting organizations. The Morris Jeff approach created an organization where there was none. This organization-less emergence took tremendous efforts on the part of a few key organizers, but in the end, a group of neighbors achieved some impressive results and forged a *community of difference* that persists to meet future challenges. The school is one of the most diverse open-access schools in the city, and the links between school and community are pervasive. It has presented a new model of urban educational reform that offers possibilities other than the charter school incubation model which has been popular in New Orleans. But the opportunities for new school creation in the post-Katrina period as well as the tremendous volunteer efforts of community organizers in establishing a new organization are barriers to replication. A discussion of *community leadership* as a model for socially just educational change seems appropriate.

If leadership for social justice is predicated on altering the ways in which social and material goods are distributed, then this approach of community leadership seems an appropriate model. A community that manages its own institutions is less likely to passively have unjust things done *to* it. They possess agency and autonomy. Of course, the broader social ills of racism, classism, and all the rest exist within this community, as in all others. Particularly when a community is explicitly diverse, acts of injustice will occur through active and passive means. Maintaining community in the face of such diversity is an arduous process full of reflection, critique, and dialogue. But a community with traditions of dialogue, acceptance of difference, and the patience to work through conflict is well positioned to do this. Members of a community can build trust through repeated interactions. This trust makes reflection, critique, and dialogue more possible. Bureaucracy cannot perform these functions. Policy cannot perform these functions. Reform models dependent purely on technical fixes or those that divorce the struggles of urban schools from the struggles of urban communities (David & Cuban, 2010; Noguera, 1996; Oakes & Lipton, 2002) do not address the issue of relational trust, even though it is a root cause of many of the challenges of our urban schools: unequal funding, racial segregation, intensely concentrated poverty, and uneven community engagement.

In urban schools, trust is a requisite for school improvement as well as school sustainability (Bryk & Schneider, 2002; Forsyth, Adams, & Hoy, 2011). By default, particularly in modern times (Fukayama, 1999), trust is almost impossible unless there are some shared concerns, time, and geographic space. It is this building of trust across racial and economic lines that might create schools that entwine, rather than separate, individual lives in a community. The existence of the Morris Jeff Community School makes the claim that socially just leadership is leadership that is shared, local, emergent, and built on relational trust in a specific geographic community. Community leadership requires individual leaders to inspire, coordinate, and build capacity. But following Freire (2000), this leadership is not charity to improve the lot of others, but self-serving and self-liberating, as a stronger community improves life for all members. As of this writing, two more charter schools have been approved that show significant influence by this community-based approach,[3] and the RSD, under the leadership of New Orleans native Patrick Dobard, has convened a working group to explore ways to support community groups in successfully opening charter schools in New Orleans.

In Furman's definition of the ethic of community, she describes schools governed by a "moral responsibility to engage in communal processes as educators pursue the moral purposes of their work and address the ongoing challenges of daily life and work in schools" (Furman 2003b, p. 2). Scholars have also pushed this definition further by suggesting that our schools also engage in such processes with their external communities (see Croninger & Finkelstein, 2003; Mawhinney, 2003).

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[3] See the Plessy School (http://www.plessyschool.org) and Bricolage Academy (http://bricolageacademy.wordpress.com).

Furman advocates that leadership perspectives that support community include distributed leadership, interpersonal skills, striving to know others, communication, teamwork, dialogue, and the creation of forums where the isolationism that pervades most work in schools (Datnow, 2011; Hargreaves, 1994; Little, 1990) can give way to sharing and support.

Community Leadership as Social Justice

Many scholars have outlined the common sense approach that urban school reform needs to take both educational and social actions if educational equity is truly a goal we hold dear (Anyon, 1997; Arriaza, 2004; Noguera, 1996). One promising source for conceptualizations of community leadership in practice is the area of community-organizing approaches to urban school reform (Cortés, 2010; Evans, 2011; Fabricant, 2010; Shirley, 1997). These approaches to reform share common commitments to broad stakeholder participation, the development of political capital via strengthened adult relationships, and the building of trust across racial and socioeconomic lines. Oakes and Lipton (2002) outline three basic elements of community organizing as they might be applicable to social justice-oriented reforms. First, relationships are created so that groups of increasingly connected individuals gain power and exercise leadership through their network. Second, the already forming community engages in dialogue about common problems and preferred solutions in order to generate momentum and focus. Third, the group takes action to move from the present state of affairs towards their preferred future state. Their analysis notes that while more technical school reforms (altered curriculum, new assessments, new schedules) are well served by the existing reform implementation literature (McLaughlin, 1990), reform efforts that directly address issues of social justice (de-tracking in their case study, or racial integration in the Morris Jeff case) require broad-based coalitions to be successful. This is logical in that when schools take on broader social forces that exist outside of schools, limiting reform strategies to teachers and students will never be sufficient. Note here that definitions of social justice limited to within-school outcomes are rejected by those exercising community leadership. Improved educational outcomes for students are likely to be a significant stated goal under community leadership, but they must be colocated with broader struggles for equality in the world outside the walls of school (Beabout, 2008).

And while nonschool goals must be on the agenda of social justice leaders, the improvement of in-school conditions and educational outcomes must also involve the work of nonschool people. Warren (2005) points out the necessity for equity-focused reforms to recognize that "addressing the structural inequality in American education requires building a political constituency for urban public schools. Collaborations with broad-based community organizations whose constituents have their children in urban schools can provide an essential piece of the political effort necessary to address these issues…" (p. 135). In a city like New Orleans, where over 30 % of children attend nonpublic schools, this goal of constituency building takes on particular significance. With a recent $1.8 billion settlement from the Federal Emergency Management Agency (FEMA) to rebuild Katrina-damaged schools, New Orleans will, in a few years, have an entire system of newly constructed or fully renovated public school buildings. But if the majority of the middle class continues to use the private schools (or Governor Bobby Jindal's statewide voucher plan) and the public school community remains divided by charter-induced competitive frenzy, will there be enough political support to even maintain these new buildings? Will the current pressures of high-stakes testing close schools that seek to balance academic and community concerns in favor of schools more willing to solely pursue academic goals? These questions do not have easy answers, and answering them is beyond the scope of this chapter. It does become clear, however, that community leadership in urban education, while broad and inclusive, is indeed radical. Current policy arrangements emphasize the role of technocrats as the arbiters of school goals in a process that requires little inclusion and little dialogue. Ernesto Cortés (2010), leader of the national community-organizing group the Industrial Areas Foundation, provides an image of what community leadership might look like:

> Robert Cordova, principal of Harmony Elementary in the Los Angeles Unified School district, initially saw his work with the congregations and unions of One-LA IAF as a way to deflect the concerns of parents onto different institutions. However, once Cordova began to have conversations with and be mentored by other institutional leaders in his community, he began to see himself not just as a manager of crises, but as an educational leader in a network of institutions with a broader vision for the transformation of his school and community. (p. 100)

This idea is echoed by Khalifa (2012) who reports on principals who, through high community visibility and advocacy for community issues, earned the trust of parents and raised achievement for at-risk youth. At its heart, social justice as community leadership in public schools rests on the simple premise that those who are most impacted by our public institutions should have a say in how they are constructed and how they function (Sarason, 1995). A key to successfully implementing community-organizing strategies is balancing the specialized knowledge of professional educators with a commitment to community-based decision-making.

Expertise and Expertism

The Morris Jeff case emphasizes a definition of leadership for social justice that includes both academic excellence for students and strengthening the political and social capital of parents and community members. Morris Jeff was created utilizing a community-organizing approach (Shirley, 1997; Warren, 2005) and continues its social justice work by retaining a volunteer governing board and principal leadership dedicated to building capacity for community leadership. Community leadership relies on partnerships so that educational offerings are a product of dialogue between professional educators and parents and neighbors. To understand community leadership is really to understand the differences between *expert leadership* and *expertism*.

Expert Leadership

Expert school leadership (Leithwood, Begley, & Cousins, 1992) has been defined as leadership that (a) manages the school so that basic functions are carried out despite individuals joining and leaving and (b) leads organizational change that leads to school improvement. Expert leaders both influence individuals and manage institutions—they both *lead* and *manage* (Bolman & Deal, 2008). Expert leadership leads to schools in which, in Fullan's almost poetic simplicity, "more good things happen; fewer bad things happen" (2001a, p. 4). While critics might argue that Fullan's avoidance of the specification of the goals of education leaves the puzzle undone, this generality is viewed here as recognition that the outcomes of expert leadership appear on multiple hierarchical levels (students-teachers-parents-community) and appropriately vary by community (Beabout, 2008). Just as the appropriate educational goals for students remain contested terrain (Kozol, 1967; McLaren, 1999; Willis, 1977), the specific goals of successful leadership vary by context as well. Nonetheless, expert leaders share some broad sets of knowledge, skills, and dispositions that enable their schools to reach shared goals. The Educational Leadership Constituent Council (ELCC) has published its list of educational leadership standards that include: (1) building and sustaining a vision, (2) establishing a positive school culture, (3) efficient management, (4) communicating with the public, (5) ethical behavior, and (6) awareness of the larger social context. While mastery of all of these standards may not be universal, they at least represent some consensus of the minimum capabilities of educational leaders as they enter the field.

As someone who works to develop leadership skills in aspiring educational leaders, I am acutely aware of the challenges of developing quality leadership. Leithwood et al. (1992), in their writing on problem-solving practices of expert principals, note that the existence of many *swampy* problems makes the teaching of explicit skills or procedures only partially effective. To Leithwood and his colleagues, "problems were considered swampy [challenging] when they involved many people, especially including people outside the school whose responses could not be controlled in any systematic way" (p. 53). They also denote the importance of a principal's prior experience in determining the difficulty of problems faced in schools. These findings underscore two aspects of leadership: (1) the importance of experience in making difficult problems easier to solve and (2) interactions with the school's external environment are a major source of difficult problems for principals. When school leaders are new to the profession and new to their community, swampy problems can consume them. Leithwood et al. also note that expert school leaders have a detailed vision of an educated student that "was consistent with the values of the larger public served by the school" (p. 59). Expert school leaders that they studied had goals that centered on what students would be or become, were flexible in their thinking if presented with compelling evidence, and sought goals consistent with the larger school community. Certainly, the final two of these qualities require experience and interaction and deep knowledge of with the school community.

Expertism

Contrasting with this idea of expert leadership is the idea of *expertism*, which can be defined as:

> the sense that *we possess* [as experts] a wealth of knowledge that *we need* to bring to our communities. It is this method in which power is bestowed upon experts and reserved from those who posses unrecognized wealths of indigenous knowledge (Carr-Chellman, 2006, p. 7) [italics added]

Expertism has been described powerfully as the white-man's burden and as the colonizing gaze. At its heart is a belief that certain individuals or groups ought to, by right, have more power in the design and maintenance of societal functions than others because of certain characteristics they possess: education, wealth, political connections, etc. The concept emerges from the historical power differences that have left human history scared by (and perhaps uniquely identified by) slavery, colonization, and social inequity of multiple forms. *Expertism* pathologizes the historical tendency of the powerful to design social arrangements, institutions, and programs that will benefit themselves but harm others. Even when projects have an explicit intent to foster social justice and equity, expertism can be identified when these activities are done with an attempt to make things better "for" the impacted people rather than "with" the impacted people.

To be clear, pathologizing the dominant form in which even most social justice-oriented work is conducted is nothing short of revolutionary. Freire (2000) explains the role of leadership for social justice work in clear terms:

> Domination, by its very nature, requires only a dominant pole and a dominated pole in antithetical contradiction; revolutionary liberation, which attempts to resolve this contradiction, implies the existence not only of these poles but also of a leadership group which emerges during this attempt. The leadership group either identifies itself with the oppressed state of the people, or it is not revolutionary. To simply think about the people, as the dominators do, without any self-giving in that thought, to fail to think with the people, is a sure way to cease being revolutionary leaders. (p. 132)

Freire was not an advocate of incremental reductions in social inequity by the provision of slightly better jobs, housing, education, and medical care to the poor. The goal was not an expanded welfare state but a society in which all people are able to become "more fully human" and are not objectified as units of labor or units of consumption by the system of governance. Freire would agree with Willis (1977) that social inequity is remedied not by providing the poor with the external trappings of wealth (diplomas, fancy houses, or cars) but by groups of individuals altering the way in which they see each other. In this sense, social justice is first and foremost a result of changed perceptions and less a description of the conditions in which some people enjoy more resources (distributive justice) and better protections than others (procedural justice) (Fine, Bloom, & Chajet, 2010). Without retooling how we perceive each other, inequality persists unabated. The Morris Jeff case, if nothing else, presents an opportunity for hundreds of diverse families to retool their perceptions of their neighbors via their shared engagement with a public school. These opportunities are in short supply in increasingly segregated communities in which many Americans live (Orfield, 2002).

Expertise Without Expertism

And so how is one to mold these conceptual understandings of social justice into practical advice for educational leaders concerned with social justice? Viewing educational leadership as an avenue for social justice work requires high levels of expertise. Such leaders must possess excellent skills in teacher hiring and development, curriculum development, student assessment, public relations, political advocacy, listening to diverse perspectives, facilities management, fiscal management, group facilitation, and building commitment to a shared vision. One might certainly call a leader with all of these skills and expert—and they might be right. But, as a moral enterprises (Starratt, 1994), education and educational leadership for social justice require *expertise without expertism*. That is, it requires the skills and dispositions to lead a community of learners and the humility that social justice work is done with the communities we serve, not for the communities we serve. As Freire (2000) notes in his discussion of revolutionary leaders,

> Revolutionary leaders… cannot believe in the myth of the ignorance of the people. They do not have the right to doubt for a single moment that it is only a myth. They cannot believe that they, and only they, know anything- for this means to doubt the people. Although they may legitimately recognize themselves as having, due to their revolutionary consciousness, a level of revolutionary knowledge different from the level of empirical knowledge held by the people, they cannot impose themselves and their knowledge on the people. They cannot sloganize the people, they must enter into dialogue with them… (p. 134)

The formidable skills of the expert leader must be mobilized in a way that connects the school to the community in dialogue, but never in monologue. Social justice leaders invest in others, share leadership both inside and outside of the school building, and stand with the community even when this puts them at odds with powerful foes (Beabout, 2008). Expertism would advocate the design of idealized educational plans (lessons, schools, systems) by those with the most training and the greatest professional accomplishments. Here, I still advocate for the best-trained and most accomplished educational leaders but let them take a seat at the table (not the podium) alongside parents, students, the business community, elected officials, clergy, and other constituent groups to collectively author plans for the schools they will direct. Leaders exercising influence in this way are developing *community leadership* in which community engagement, shared leadership, and building community social capital are seen as fundamental, rather than tangential, to the work of schools. It is this final task of exercising community leadership in a current political context that does almost everything to prevent it that I will turn to next.

Four Cantankerous Contradictions

School reform policy in the USA, currently supported by both major political parties, is that student academic achievement is the sole metric of school success, that schools in and of themselves are the vehicle for producing such achievement, and that academic success must be achieved for all students with no excuses or a school should be closed down and reconstituted with new faculty and leadership. These ideas have been operationalized in much of the market-based approach to educational change and the burgeoning charter school movement (Lubienski & Weitzel, 2010; Wells & Scott, 2001). These beliefs are in direct opposition to the communal process advocated for by Furman and Shields (2003) and the emphasis on engaging with the broader community and building external constituencies that are key elements of the community leadership as demonstrated by the Morris Jeff case. Below, I explore this dissonance in a series of cantankerous contradictions. I use the word *cantankerous* because these contradictions are not simply irreconcilable ideas, like an erroneous mathematical calculation, soon to be erased from a blackboard. They are noisy and disruptive contradictions that should alter the ways in which we view leadership in schools and animate our actions towards social justice. They should mold our understandings of leadership for social justice to include some agency on the part of a school's community, regardless of income, skin color, or educational attainment.

Cantankerous Contradiction #1: Heroic vs. Democratic Leadership

Community leadership is shared and democratic as opposed to heroic and charismatic. Yet, this is exactly the mode many charter school leaders in New Orleans have been forced into. Under today's market-based policies, principals are responsible for delivering improved test scores to the public in exchange for having authority for *nearly all* of the functions pertaining to opening and running a school. In New Orleans, they often select their own board, write their charter application to the state, take the lead in defending that document to the state, sell the school to potential funders, and recruit staff, families, and students. Regardless of the leadership philosophies of the individuals placed in these roles, any notion of shared or democratic leadership is enacted only after hundreds of decisions and thousands of hours had been spent by the principal working essentially alone. The Morris Jeff case depicts a charter school started by a community. This community selected its own curriculum, fought for its own building, hired a principal who was comfortable with significant community leadership, and raised its own funds.

Cantankerous Contradiction #2: Market Competition vs. System-Wide Improvement

While the ethic of community encourages leaders to be relational in a world characterized by antagonistic us-them relationships, much of the leadership embedded in today's market-based reform policies focuses on competition leading to a higher place on the test-score/league tables that are published following state testing each year. Leaders in such an environment are incentivized to push out troubled students, to keep organizational knowledge private, to poach teachers from neighboring schools, and to design programs that improve their school's scores at any cost (see Rothstein et al., 2008). Under the hypercompetitive conditions fostered by modern reform policies, educational leaders are rewarded for having higher scores than the school down the street. This creates a disincentive for relationships between schools rather than cooperative ones. This flies in the face of much recent thought on educational change emphasizing the use of networks of schools (or educators) to improve system-wide performance (Daly, 2010; Hopkins, 2007).

Cantankerous Contradiction #3: State Control vs. Local Control of Educational Goals

Leadership informed by the ethic of community supports the co-construction of purposes and actions of schools. This inevitably requires dialogue among the diverse groups of parents, community members, and educators that make up the environment of a school. Paradoxically, while the charter movement in the USA has been billed as an increase in autonomy for educational leaders (which it is), other groups (parents/community) often have less, not more, input into setting the agenda for educational means and ends. Charter schools are run by appointed boards, not elected ones. They are authorized by states or universities or school districts, with the express goal of improving test scores. School principals are hired by these boards for their commitment to raising academic achievement levels. In Louisiana, charter schools are renewed after 3 and 5 years of operation. These decisions are based primarily on student testing and fiscal performance, with attendance and graduation rates also being factored in. While charter applications include a section on school-specific goals, they are significantly less important, as the state doesn't track or enforce performance on these goals. In essence, the "local control" lauded by school choice reformers today applies only to educational *means* but not *ends*—as these have been increasingly fixed by the state testing policies.

Cantankerous Contradiction #4: Developing Leaders vs. Novice Teacher Churn

Leadership in the practice of community leadership is distributed—and its goal is developing leadership in others (Fullan, 2001a). But the development of distributed and shared leadership requires intentional action, resources, and existing leaders with the confidence and skill to identify leadership talent and develop it. While thin staffing arrangements often require classroom teachers to take on administrative tasks during the start-up phase of a charter school, I differentiate between having teachers help out with administrative tasks and leadership development which is planned and intentional and includes supervision and coaching from more-able leaders. Multiple factors make the development of teacher leadership challenging in their "no excuses" reform environment. Thin budgets at start-up negatively impact staff development time and expenses. The pressures of state accountability and the hyper-racial segregation of many charter schools (Frankenberg et al. 2011) mean that meeting testing targets requires an all-out assault—leaving little in the way of resources for faculty development. Media reports from post-Katrina New Orleans indicate the high level of charter school teacher burnout (Carr, 2010) and the constant churn of inexperienced teachers working with our neediest students (Carr, 2009). These pressures, of course, are certainly not unique to either charter schools or Louisiana (Olsen & Sexton, 2009). Community leadership suggests that while immediate academic improvements are certainly an important leadership goal, leaders must also set up sustainable investments in professional educators to establish true learning gains as well as to insulate schools from the shifting priorities of politically driven education reform.

Implications for Theory and Practice

Public schools are undoubtedly in an age of increased accountability. The interesting piece of this accountability, however, is that it is the state that is the main actor here. Instead of the American tradition of locally elected school boards and open meetings laws as the primary mode of accountability, states are now telling local communities, "Don't worry, I'll take care of this. I'll let you know which of your schools are good and which are not." Increasingly, states are also prescribing specific actions (closure, charterization, turnaround) for the schools they deem unworthy. This sets up educational accountability as an action done by politically powerful on the politically marginalized. In communities like New Orleans, the level of community-based accountability is almost zero. But when community leadership exists in the school, local accountability is invigorated. Educational goals that are important locally can be safely pursued. By capitalizing on geographic proximity, communities (rather than bureaucrats) can provide more responsive, intelligent, and sustainable accountability than the state can. By advocating for particular curricular or pedagogical changes, they can preempt the rather heavy-handed rank-and-reconstitute policies of most states which causes disruption with no guarantee of improvement (Beabout, 2012). Of course, if this community leadership is to be wise leadership, particularly in our poorest communities, we need to develop adult leadership in places where it is not often fostered. This is what makes the community-organizing approach to school reform a powerful one. It provides for the development of shared leadership at the local level so that communities get inside and participate in the management, operation, and, indeed, the defense of their children's schools.

Appendix A: Job Advertisement for Morris Jeff Community School's Founding Principal

Founding Principal, Morris Jeff Community School (Elementary)

Position: Founding Principal
School: Morris Jeff Community School (Elementary)
Salary: Competitive salary and benefits package

Background

The Morris Jeff School Steering Committee seeks a founding principal to help build and lead what will become one of the most innovative and successful public elementary schools in the country.

The new Morris Jeff Community School will open as an "autonomous public school," officially under the Recovery School District, but with full authority over budgeting, hiring of staff and curriculum devolved to the Morris Jeff Community Board and the school leadership team. Morris Jeff Community School will open first as an incubator school with 60–80 early elementary students (pre-K through 1st grade), growing over the next few years into a full-scale elementary school.

The school will be in a temporary location in the Mid-City area of New Orleans for 3 years, before moving to a new $19 million, custom-built facility.

The principal will work with a community board with extensive contacts throughout New Orleans to build a top-flight elementary school from the ground up. This will involve engaging with parents' and community's vision for the school, recruiting and mentoring top-quality teachers and other staff, budgeting, and working in an ongoing way with board, staff, and community to develop the school's pedagogic philosophy and curriculum.

The school has the approval to open in the fall of 2009, if a top-rate school leadership team and founding staff are identified in time. Otherwise, the school will open in the fall of 2010.

Experience, Background, and Qualifications

The successful candidate will have expertise and leadership experience in an elementary setting; familiarity with the developmental, behavioral, social, and academic needs of students in the early childhood years; and a concrete record of success. The candidate should have strong organizational skills and be able to create an organizational culture that engages and inspires teachers, parents, students, and community members in a rigorous dedication to teaching and learning. The candidate should be a creative and flexible thinker, with a strong focus on identifying and cultivating teachers of the highest quality. Experience teaching at-risk students in an urban school district is important.

We are looking for a school leader with the vision to push beyond the traditional structure and narrow expectations that too often limit the potential of public education.

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Chapter 31
Making a Difference: The Balance of Stance and Strategy for Social Justice Advocacy

Phil Hunsberger and Phyllis Balcerzak

> *I believe that the school is primarily a social institution. Education, therefore, is a process of living and not a preparation for future living.*
>
> John Dewey

Dewey's (1923) thought regarding school offers a posture exceedingly supportive of social justice advocacy. The idea that education ought to be regarded as a "process of living" strengthens the idea that social justice advocacy cannot merely be an effort of description and debate but instead the formulation of policies and actions to respond to social injustices. School leaders often see social justice advocacy as a means to remediate unfairness within the school setting. Unfairness may range from issues of bullying to course selection, grade distribution, and/or advanced course opportunities. No one would doubt that these are not important issues, but they tend to narrow social justice efforts to a plan of remediation or restitution. The Leadership and Racism Program as developed by Educational Equity Consultants is focused upon a more comprehensive scope to social justice advocacy. Consider the following image as a way of describing that scope:

> Picture a parking lot in front of a grocery store with lots of spaces for cars to park and some close to the store labeled specifically for people living with a disability. Many drivers will respect this label and park somewhere else on the lot. However, others may ignore the label justifying their parking with the idea that they will only be a short time in the store. This image offers us three levels of thinking about social justice advocacy.

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> The first of these levels is the fact that the construction of the parking lot includes an acknowledgement of the need for some customers for closer access to the store. Much like public education we acknowledge different needs in formal ways i.e. special education, gifted programs, AP courses.
>
> A second level of thinking is exemplified by those who arrive at our imaginary parking lot respecting the needs of different customers choosing to park in other spaces. Much like many educators who respect the various learning needs of the students and adjust instruction to accommodate their needs.
>
> A final level of thinking is one of either denial or oblivion. This would be those who arrive at the parking lot and ignore the label, park their car in the space, and go about their shopping. Postman and Weingartner (1969) suggested that public education is guilty of a "carry on regardless" nuance. This level reflects that "carry on" dynamic and as well, the dysfunction of a "colorblind" stance that ignores significant data that indicates inequity. This level may emerge from a blatant denial of difference, but more likely, it results from a lack of a critical consciousness regarding social justice issues.

Since 2001, Educational Equity Consultants (EEC) has worked with approximately 2000 school leaders and school faculties through the Leadership and Racism Program (LRP). The LRP program explores how personal attitudes about race and racism might be limiting students' capabilities to achieve. EEC began with several school districts in the St. Louis, Missouri, area and over the years has included school districts in Illinois, Virginia, Pennsylvania, Wisconsin, and, in partnership with other agencies, California. Educational Equity Consultants (EEC) has worked to develop in these educational leaders a critical consciousness that will confront policy, practice, and cultural nuance that prohibit certain students from successful learning opportunity and performance. A critical consciousness is exemplified by educators who arrive at our "parking lot" metaphor with a sensitivity and diligence to avoid the "carry on" disposition or the dysfunction of "color blindness." The capacity to develop such a consciousness is the willingness to explore personal dispositions, attitudes, beliefs, and insights that inform behaviors and actions. This focus upon stance, the manner in which we see, hear, and interact with others, is fundamental for any effort toward meaningful reform in school systems, and though we begin this focus primarily upon the issues of race, this personal exploration does not ignore other identities that a diverse student population includes and may similarly reflect injustices. However, the achievement gap as reflected in public education of the United States is framed predominantly around race, and this initial focus is consistent with the present-day demands placed upon school leadership.

In an editorial for *Education Week* (2001), Julian Weissglass wrote:

> Any reform effort designed to reduce the achievement gap that does not help whites and people of color heal from the hurts of racism will not likely succeed over time. Although educators cannot, by themselves, solve all the problems caused by racism in society, it is possible for us to construct healing communities in which people can learn how to listen and give attention while others heal. http://www.edweek.org/ew/articles/2001/08/08/43weissglass.h20.html?tkn=TYMFqDBpaD%2Fb5SKjt3d%2B2Qn7KXEKM7o39AB0

Though race is a social construct with no biological evidence of fact, its impact upon constructing a society in which dominance and privilege are afforded only to Whites, while people of color are targeted and suffer from the internalization of their oppression, is rooted in the social, economic, and political fabric of America. The history of America is filled with evidence of institutionalized racism. Thus, racism is far more than merely individual acts of injustice but results as well from an architecture of governance, the building of economic strength, and a hierarchical view of humanity that sustains power and privilege for the dominant culture – the White race. Thus, Weissglass' call to reduce the achievement gap with a focus upon healing from racism offers terminology seldom associated with theory and practice within educational leadership. The notion of healing brings attention to a personal agenda of stance rather than the commonly held focus of strategies for reform efforts. It echoes as well Ronald Edmond's (1979) position that we know what to do for learners, we have strategies for ALL learners, but instead the question is why we have not had the "will" to do it. Simply put, we have a plethora of strategies of both practice and policy, and we still have an achievement gap. Thus, this exploration of personal stance aligns our work with both a healing focus and challenges the development of a "will" toward action. It also contextualizes our efforts in an affective domain, often regarded in school reform as important but rarely viewed as the "main course."

Leadership and Racism Program: Grounding Assumptions

Clearly to impact the affective domain of learning requires a strategy of reflection upon practice. Reflection for educators is to explore a landscape of both hard ground and swamp as suggested by Donald Schon (1987). The hard ground presents some manageable problems lending themselves well to research-based theory and technique. The swamp however is, as one would expect, full of messy confusing problems. Schon suggests that it is in the swamp we find the problems of greatest human concern as in confronting injustice. The swamp is filled with indeterminate zones of practice, ones that include uncertainty and uniqueness, and that are dominated by values. Therefore, it is important to make transparent a set of assumptions upon which we have built this program to navigate the swamp.

Assumption #1. We believe that racism is an intentionally developed system to insure a dominant group both power and privilege over a targeted group. As building a house begins with architectural drawings of how elements fit together, we believe that institutionalized racism is built upon carefully designed structures to maintain this system of a dominant and targeted group. For this reason, we refer to the "architecture" of racism as a means to begin to understand the system. Race is a social construct having no biological basis. But racism is alive and well. There is a tendency to treat racism as merely an interpersonal issue, a form of individual human behavior. But doing so avoids the deeper issues of institutionalized and structural racism, the architecture of this system. For this reason, we use various theoretical models for individuals to understand and recognize the institutionalized racism we wish to unravel.

Assumption #2. We believe that conscious learning emerges from places of dissonance. Our social environment is one in which we receive countless messages that shape our thinking about self and others. We cannot escape these messages that all too often distort truth. These messages eventually become embedded in our dispositions regarding our own sense of identity as well others different from ourselves.

The only means in which we have to escape these messages is to confront them, and confrontation for many takes us to a place of dissonance. Therefore, we accept that this work may often lead folks to an uncomfortable place in which their own beliefs may be challenged. We believe that the “journey” we often describe in our work is filled with this kind of circumstance, and we often suggest that people “lean into the discomfort.”

Assumption #3. We believe that the feelings of blame, shame, and guilt are yet other elements that have sustained racism in America. Spending time focusing blame on individuals for this system is often wasteful and does little to dismantle the system. We believe that shame and guilt, though real feelings, provide little energy for transforming individual lives. Thus, our work is to create a safe environment for individuals to explore a new way of thinking about self. We accept that feelings of blame, shame, and guilt may emerge from the work; however, we remind individuals that none of these emotions will help to reconnect us to our inherent goodness.

Assumption #4. We believe that our unconscious minds drive many of our decisions regarding human interaction. We believe that all of us carry a set of assumptions about others, assumptions that we have come to regard as truth. We believe that our efforts to create an intentional and courageous examination of those “hidden” assumptions allow us to impact students’ lives in a more meaningful, authentic fashion. Our work is built upon the endless research regarding teacher expectations and students’ performance. We believe this work helps to unravel the unconscious assumptions that each of us holds regarding the intellectual capacity of our students and as well how we view what constitutes “acceptable” behavior.

Connecting Stance and Students

Alignment of educators’ stance regarding students and their performance has a substantial body of research to support this exploration. As early as 1968, the work of Rosenthal and Jacobson benchmarked the impact an educator’s stance regarding students impacted their academic performance. The observer-expectancy effect (Pygmalion effect) demonstrated that unconscious biased expectations influence instructional outcomes. This influence can be either a benefit or equally a detriment depending upon the identity of the student and the unconscious stance of the teacher regarding that identity. In the same year, 1968, a third grade classroom brought a racial lens to this Pygmalion effect. Their third grade teacher, Jane Elliott, wished to demonstrate the distress of prejudice upon individuals. She constructed a relationship between behaviors and intellect associated with blue eyes and brown eyes. Over a 2-day period, she assigned positive behaviors and intellectual prowess to only blue-eyed students on 1 day and then to brown-eyed students the next day. The students felt the impact of prejudice and targeting as well as the distorted notions of superiority and inferiority. Just as Rosenthal and Jacobson purported, third graders labeled with a “superior” identity scored high and those with an “inferior” identity scored low even when these identities’ groups were switched on the second day of her experiment. Once again, even with young children, even in the context of a brief 2-day contrived experience, a conscious and explicit stance that is held regarding differences impacted behaviors and actions. Years later, Claude Steele explored this phenomenon regarding academic performance as he and his associates researched stereotype threat – the threat of being viewed through the lens of negative stereotype or the fear of doing something that would inadvertently confirm that stereotype. Steele's research implicated the power of stance as it relates to performance even with students who have not been routinely viewed with a negative stereotype. Within the context of instruction, teachers who expect and believe their students to do well and show intellectual growth will do so. Conversely, teachers who do not have such expectations for student performance may unconsciously behave in ways to discourage and diminish achievement.

Most recently, the work of Ronald Ferguson demonstrates yet another impact of stance upon instruction and student engagement. His research includes numerous surveys of seventh and eleventh grade students from school districts with strong financial support but still demonstrate an achievement gap. These surveys indicated a significant number of non-White students feel that encouragement rather than demand is a stronger leverage for classroom engagement (Ferguson, 2007). Encouragement unlike demand emerges from an affective rather than cognitive domain. Teachers tend to encourage students for whom they see to have potential. It is true that potential is often benchmarked by test scores or past schoolwork performance, but these measures can be a misrepresentation of intellectual capacity. Students who do not feel a sense of commitment to or a belief in their ability in the school settings often do not engage their full potential within the classroom setting.

Engagement in the classroom with little doubt has a strong link to a feeling of belonging. Students who know they are safe, have a sense of value, and are able to exhibit some degree of power and self-actualization will no doubt exhibit stronger engagement in school. Those students because of issues of social justice who feel lost, separated, and have no sense of belonging will seek their "own sense of belongingness" in a context that is more antisocial (Kaplan & Johnson, 1992).

All these findings reflect a special importance of teacher-student relationships as a source of achievement motivation for Black, Hispanic, and disenfranchised students. Here again, the unconscious stance regarding a student's identity has a major impact upon the authenticity or "specialness" of that relationship. Herbert Kohl (p. 124) suggested the following regarding the absence of that relationship:

> To agree to learn from a stranger who does not respect your integrity – or I would say, your identity – causes a major loss of self. The only alternative is to not learn and reject the world.

The Journey: Leadership and Racism Program Description

The Leadership and Racism Program (LRP) is a professional development program which assists teachers and administrators to develop the knowledge, skills, and dispositions necessary to integrate social justice issues into the learning environment and to implement culturally relevant teaching in their classrooms and schools.

LRP is based on the premise that there is an important correlation between student achievement and the capacity of teachers and administrators to develop and sustain a critical consciousness about race, class, and gender. The program facilitates the growth of race consciousness through a series of activities and discussions that focus on the intersection between the participants' individual racial identity and the enactment of their role as teacher and/or leader of the district's curriculum and instruction goals.

The program opens with a 2-day overnight retreat (20 h of instruction). The retreat is experiential, asking participants to understand and address their own issues with race, in the context of other oppressions, for example, class and gender. As has been established, the program attempts to balance "stance" and "strategies" giving each of these domains an equal standing with regard to the development of critical consciousness. The retreat is followed by sessions conducted over a school year in school and district settings. These sessions assist districts and schools in building leadership teams by helping individuals continue practicing "courageous conversations" with their team while expanding their capacity to "talk race" to others they encounter in their role as educators. The success of transferring the insights gained from the retreat to the school setting is dependent on establishing trust among the individuals on the leadership teams as well as the continued development of skills to incorporate effective strategies into the enactment of a culturally relevant curriculum. This connection between "talking race" and increased trust among administrators, teachers, and learners leads to an increase in student achievement.

Unlike other professional development programs, the LRP does not provide a "lesson plan" that can be adapted and implemented into a classroom. Instead, the program is built upon the same ideology as expressed by Dewey (1923) that education is "a process of living." For this reason, we often refer to the program as *a journey*, and though all of us have not arrived yet, we agreed to go.

The Retreat

A 2-day retreat begins the program, and during this time, participants focus upon personal stance, i.e., the dispositions, attitudes, and beliefs that are held regarding differences. Beginning with stance, in particular a stance that evolves out of our socialization regarding race, can only be transformative in an environment that is free of blame, shame, or guilt. An environment of safety emerges from one in which language is clarified. For this reason early on, we make explicit the definitions used for this leadership development work, which include:

- *Prejudice*: an attitude, opinion, or feeling formed without adequate prior knowledge, thought, or reason.
- *Discrimination*: the effective, injurious treatment of other groups so as to give an advantage to one's own group.
- *Oppression*: the one-way systemic mistreatment of a defined group of people, with that mistreatment reinforced and supported by society.

- *Racism*: a complex system of beliefs and behaviors, which are both conscious and unconscious and personal and institutional. They result in the oppression of people of color and benefit of the dominant group. It is a system grounded in the presumed superiority of the White race.

These definitions are introduced to participants with certain visual representations to enhance understanding and applications. A prejudice can be viewed as a "narrative" often established outside of our own identity development. This narrative becomes an unconscious tape that plays out in our heads when we encounter differences. This tape includes distorted narratives about people different from ourselves. In her book, *Young Gifted and Black*, Theresa Perry (2003) suggests that what we need in schools is a "counternarrative," one that confronts the messages surrounding our young people about their lack of intellect and capacity for learning. Discrimination, unlike a prejudice, is visible and an action, one that supports a dominant group while targeting a subgroup. Oppression has an "architecture" and does not emerge out of accident but instead by intention. Finally, although race is a social construct, racism is an intentional oppression which also has a structure. These definitions are presented to the participants as a demonstration of transparency without a need to seek group agreement.

The exploration of each of these definitions and their impact upon our personal lives is then supported with three fundamental anti-oppression constructs: the cycle of oppression, the table of oppression, and the fabric of oppression. These constructs assist participants in a deeper level of learning regarding racism and other oppressions.

Cycle of Oppression

This model outlines the manner in which the outside world has influenced the way we think about others and ourselves. The cycle begins in our early years when we encounter misinformation, missing history, biased history, and stereotypes. We refer to these as messages that define ourselves and others. Often these messages come from loved ones and significant persons in our lives. They come to us as well from the media, our faith-based affiliations, and of course school. Peter Taubman's (1993) work regarding identity development calls this early stage a "fictional register" filled with distortion serving to imprison us as subjects leading to alienation and objectification. A second stage in the cycle is that of formal institutions that reinforce these earlier messages. This would include the media, government, houses of worship, economics, and, again, education. These two stages cause an internalization of belief systems that ultimately lead to a final stage of collusion in which each of us passes the same messages we received on to our children. The cycle of oppression as an overview of our socialization process begins the personal journey as each participant revisits the messages they heard and learned at younger ages. The cycle is a first episode of reflection in this journey in which participants uncover what may have been installed and reinforced in our own life experience. Ultimately, our effort is to interrupt the conscious and unconscious ways in which we each collude with these messages, in particular the negative messages about differences that we have encountered about other identities.

Table of Oppression

The table of oppression is a graphic way of presenting the “architecture” of oppression. It also provides individuals a way of thinking about themselves and their own individual collusion, both conscious and unconscious, regarding oppression. The table stands because of two sets of legs that hold it in place. One set of legs belongs to the dominant group, and for the oppression of racism, that would be the White race. Built upon the distortion of the Calvinistic doctrine, the Pilgrims arrived with the idea that God had constructed mankind upon a hierarchical system in which “whiteness” was closest to God and their cause was sanctified as “Manifest Destiny.” The notion of supremacy was consequential to a belief of a status of privilege, entitlement, and advantage. This belief gave as well a right of ownership over those that have been deemed “less than” in the eyes of God. The set of legs – supremacy and privilege – essentially led to the construction of the other set of legs that of internalized oppression and targeting.

In racism, the targeting of people of color is ubiquitous as it exists in all “walks” of life. Opportunity and access for goods, resources, and benefits are clearly diminished by the power held by the dominant group. This constant barrage of assault leads as well to an internalization of the oppression, one in which, as Paulo Freire suggests, over time the thinking that was used to oppress individuals will be internalized and ultimately they will oppress themselves and will not need the dominant group to keep them in subjection. He further states that the tool of the oppressor is the mind of the oppressed.

This table assists individuals in examining the institutionalization of racism. It is important for participants to recognize that racism, and for that matter any system of oppression, is not merely personal behavior but exists within a systemic structure the holds both privilege and power in place. The symbiotic relationship of privilege and targeting and superiority and inferiority helps participants understand how each racial group has personal challenges to address as well as the work that must be done together.

Fabric of Oppression

As has been stated, though the focus of the LRP is racism, the work does not ignore the social injustices of other identities. Both the cycle of oppression and the table of oppression apply to the multitudes of identities that we each possess. Realistically, no student is asked to leave at home their identities regarding gender, age, religion, sexual orientation, looks, abilities, etc., before they arrive at school. Nor should we ask this of our educators. The oppression of any of these identities is constructed in the same way, with a dominant group having power and privilege, while others remain targeted and experience limited or no access to goods, services, and resources. Additionally, we cannot at any time divorce ourselves from our own specific identities. Thus, we present this model as a fabric of oppression with each of the strands representing the multitude of "isms" we encounter in our society. This model also allows the opportunity to see the ways in which all of these "isms" intersect so that as a male in the dominant gender role may indeed have privilege, a Black male might experience that privileged role differently than a White male. This construct reflects the complexity of living in a very pluralistic society in which social injustice can easily be obscured, ignored, or minimized.

These three constructs are examined with multiple forms of mini-lectures, interactive activities, dialogues, triad conversations, and both White and people of color caucuses. The variety of configurations in which this courageous conversation is structured allows for various viewpoints, beliefs, and experiences to surface among participants. Frequently, the call for "no blame/no shame/no guilt" helps to maintain the conversations so that the dialogue is not silenced. Early in the retreat, a set of norms are establish that include respect, engagement, speaking from one's experience, and listening with the intent of being influenced and are offered to maintain an environment of safety and honesty. Examining each of the table legs of oppression can easily provoke feelings of distress, anger, and/or confusion. The retreat is designed in a way that acknowledges these feeling and provides a path which enables understanding, empathy, and a willingness to address racism.

The Follow-Up Sessions

The success of transferring the insights gained from the retreat to the school setting is dependent on establishing trust among the individuals on the leadership teams as well as the continued development of skills to incorporate effective strategies for enacting culturally relevant curriculum.

As stated, the retreat begins the journey. At the conclusion of the retreat, participants are divided into groups referred to as ally groups. These groups are expected to meet regularly to continue the conversations regarding their personal growth in developing their own individual critical consciousness of the issues of racism and how it impacts their classroom and school or district. The ally groups can serve as a pivotal leadership function to focus a social justice lens upon the school systems' policies, practices, and decision-making processes.

After the retreat, participants meet for an additional 24 h of professional development. It is during these follow-up sessions that we begin to shift the focus from personal stance to professional strategies. These sessions examine more thoroughly the work of Theresa Perry, Claude Steele, and Asa Hilliard III's outstanding essays in their book: *Young Gifted Black*. In this examination, participants begin to construct counternarratives as examined by Theresa Perry. They explore the issue of stereotype threat as researched by Claude Steele and its impact upon instructional practice. Finally, this same book offers Asa Hilliard III examination of the true essence of the "gap" and its spurious relationship with achievement as opposed to preparation. Follow-ups also begin the process of talking race in the classroom. Using Jane Bolgatz book (2005), *Talking Race in the Classroom*, participants explore strategies for having conversations regarding social justice issues within the classroom setting. Finally, the Center for Research on Education, Diversity & Excellence (CREDE) offers a set of instructional standards that make cultural relevance within the classroom setting explicit behavior rather than implied practice. Some districts have incorporated the CREDE standards into their curriculum development and review process and into teacher and administrator evaluation.

LRP: Theory of Change

This connection between "talking race" and increased trust among administrators, teachers, and leaders leads to an increase in student achievement. This triad of learning – self-awareness, leadership team building, and culturally relevant instruction – characterizes the three phases of the LRP program. As participants deepen their awareness of the impact of race on their professional behavior (Phase I), they are enabled to create more authentic relationships across difference with colleagues, administrators, students, and parents. This strengthens individual voices for social justice and enables leadership teams to become proactive in acquiring resources to improve teaching and learning of their students (Phase II). Support and interaction of leadership teams at both the school and district levels enable courageous conversations to inform curriculum and instruction and school and district policy (Phase III).

Two Lenses for Making a Difference

Educational research regarding professional development is often the examination of correlations between the developmental experience and its impact performance. One lens to assess the impact of LRP includes a study of the development of a critical consciousness regarding social justice issues (the experience), and a second lens is an examination of the patterns of changing behaviors within the classroom and district settings (performance).

Research Findings: A Lens upon Stance

A study was conducted to determine if the program's use of affective strategies at the retreat shifted the disposition and stance of participants toward their own participation in institutional racism and if shifts in consciousness transferred to changes in the school setting. The research hypothesis was:

> If the program impacted participants' stance towards race and institutional racism, then evidence of discourse would indicate a shift from color-blindness to color-consciousness. Secondly, would color-awareness transfer to anti-racist leadership activities in daily activity?

This is a qualitative, longitudinal study of the impact of the program over a 6-year implementation period. Conclusions and insights were based on a conceptual analysis (Bogden & Biklen, 2007) of the evaluation summary data provided by participants at the close of their retreat and at the end of the last follow-up session. The summary data are comprised of an average rating on a 5-point Likert scale and comments written by participants on eight open-ended questions on the retreat and follow-up evaluations. Evaluation summaries included in this analysis represent 19 schools who participated in the program from 2003 to 2008. The participants in the retreats and follow-up sessions were from multiple school district roles: teachers, administrators, staff, and parents. The responses used as the primary data source in this evaluation are not identified by school district role, race, or other demographic markers.

The evaluation summaries from both the retreats and follow-up sessions were read and coded in the following manner:

1. Codes were applied from themes identified from the stated purpose of each of the two parts of the professional development program, i.e., retreat and follow-up. These were "color consciousness," "knowledge of racism," and "strategies for action." As stated in the program design, color consciousness and knowledge of racism were emphasized in the retreat, while curriculum and strategies for action were emphasized in the follow-up sessions.
2. Themes that emerged during the analysis were added to the code list and reapplied to all reports in an iterative process. There were two dominant emergent themes. The first was derived from comments about vulnerability, honesty, openness, and deeper understanding of colleagues. These were summarized into the thematic category, "affective relational." A second dominant theme was derived from comments about the workshop activities or logistics. These were summarized into the thematic category, "process comments."

Since the data presented were already summarized from individual reports, the unit of analysis is the individual response not the participant. A meta-analysis was conducted of the responses of participants on existing evaluation forms that were administered at the end of each retreat and at the conclusion of each of the follow-up programs. Each response for each question was coded according to the main conceptual themes present in the goals of the program (Fig. 31.1). Responses that did not fit the conceptual themes were labeled and categorized as emergent. These codes were reapplied to each evaluation in an iterative process resulting in a total list made up of both prescribed and emergent themes. Respondent comments that did not apply exclusively to one thematic code were assigned to multiple codes. Primary and secondary themes were assessed for the overall retreat and follow-up data sets. Analytical themes were then compared to programmatic expectations for both the retreat and follow-up phases. Primary and secondary themes were compared to programmatic activities to evaluate the impact of various activities on the participants.

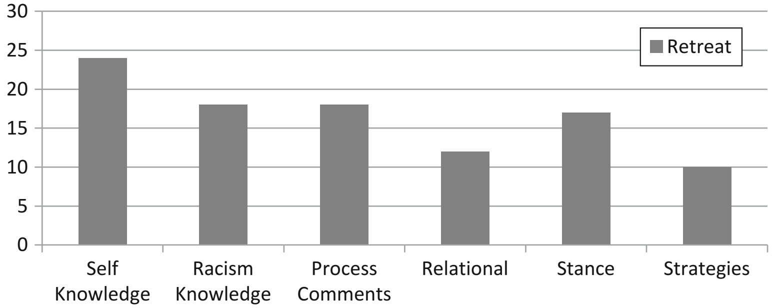

Fig. 31.1 Percentage of response by themes ($N = 3{,}937$), LRP retreats, 2003–2008

Results of Conceptual Analysis

The analysis was based on the pooled data from the implementation of 46 retreats and the subsequent follow-up sessions, attended by participants from 19 schools over a 6-year period of time (2003–2008). The coded responses have been recorded and tabulated by the question number with which it was identified. However, the participants' comments did not correlate to the question prompt; rather, all themes showed up in all question categories. So, question type was not a useful organizer for this analysis. Therefore, results are discussed relative to the frequency of response within each theme, regardless of question prompt.

Analysis of Retreat Evaluations

Generally, comments on the retreat evaluation summaries were heavily weighted toward personal awareness/awareness of racism and a disposition to change one's relationships with colleagues around issues of race (Fig. 31.1). These comments were indicative of a highly affective discourse. For example, one participant stated that the experience was "powerful, shocking, challenging." Another said, "I am still digesting everything but know my eyes are open in a way they weren't before." And another transferring awareness to a desire for personal change declared to "Stop justifying myself." Others extended personal awareness to a desire for change in the broader social sphere, "I want to become aware outside of the retreat-use in real life, be the solution not the problem." And "I want to connect with more people of the opposite race, develop my allies."

These results align with the stated expectations of the activities conducted during the retreat format and with the primary objectives of the program. In response to prompts to specify post-retreat action steps, some responses indicated a specific school- or district-based act. However, a surprising number of responses to this question demonstrated a more affective disposition or stance to address racism, not specific actions typically associated with job role in the educational setting. For example, although not directly asked, many respondents stated action steps to include working with others, affective relationship building within and across races within district teams. Therefore, the disposition/stance of participants to address racism, whether through more personal consciousness raising or "courageous conversations" with ally groups, emerged as an analytical theme and solid outcome of the program.

Analysis of Follow-Up Evaluations

The follow-up evaluations had the highest percentage of all responses in the category of a desire to enact strategic change in the educational setting. This is in alignment with the program's curriculum plan, highlighting the retreat as a space to focus on personal awareness, color blindness, and knowledge of racism and the follow-up sessions to focus on strategies that transfer to the school and/or district setting (Fig. 31.2).

These actions that resulted from individual shifts in consciousness appeared in a variety of ways. For example, in one district, a superintendent immediately changed hiring practices to recruit candidates of color into leadership positions. In another, the administrator in charge of assessment began to analyze data in ways that would reveal inequities and remedies to the racial achievement gap. In a classroom, a teacher designed instruction about racial inequities that resulted in her class of predominantly White students writing letters to their city and state legislators about policy change. Another teacher, well practiced in color-blind behaviors, pointed out to a student the similarity between a brown crayon and the color of her skin resulting in the child's willing engagement in activities previously shunned. Nearly, all of the respondents articulated a need for more time to talk with their ally groups.

Comments indicating personal awareness were also present in the follow-up but with less frequency than the retreat comments. Thus, the retreat impacts participants' awareness of racism, and more importantly, the participants retain this attitude from the retreat at least to the end of the post-retreat follow-up sessions.

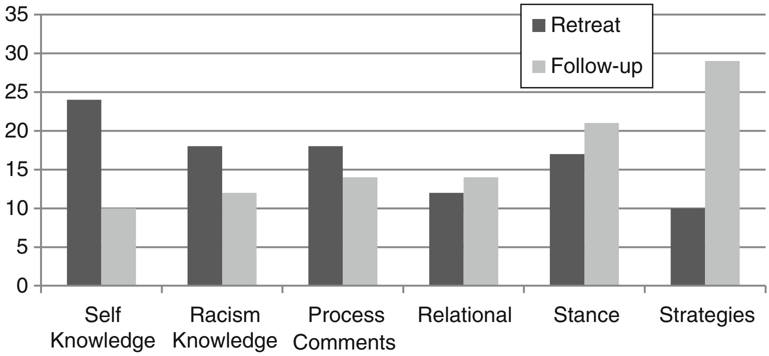

Fig. 31.2 Percentage of responses by theme, $N=3{,}937$ (retreat) and $N=1{,}760$ (follow-up), retreat + follow-up, 2003–2008

Further Considerations

Many participants wanted the follow-up sessions to attend to relational intimacy similar to that created in the retreat environment. This expressed need points to a tension between continued development of personal emotional awareness and the desire to enact strategies to address racism in the schools. The participants' comments are divided between strategies that would re-create the emotional environment of the retreat and those that directly address the racial inequities that result from decision-making in districts, schools, and classrooms.

This leads to questions of how educators might best continue the deep unpacking of unconscious racist beliefs in an institutional environment that is structured for activity, often in ways that contradict reflection. The evidence from this study would indicate that the personal and public awareness and knowledge of racism created through the retreat program transfer to the educational setting as a desire among participants to act as change agents. Additionally, the strategies for change that are enacted vary from changing hiring practices, attending ally groups to share knowledge and practices, engaging colleagues in interpersonal conversations about racism in the setting, and discovering ways to create learning opportunities for children of color in classrooms. Additional research might clarify how the deepening of emotional awareness of educators interacts with the emotional needs of students of color and the intellectual demands of the curriculum. A deeper understanding of the multiple processes that educators use to move between self-reflection and change in practice will allow more effective support structures to be provided for change agents.

Back to the Parking Lot: Level One

This chapter began with the metaphor of a parking lot to establish the social justice context upon which the Leadership and Racism Program has been developed. Three levels described in the imaginary parking lot served to provide a lens upon which the LRP program could be reviewed. The "lot" as described included designated spaces based upon customer needs. Much like a school district certain decisions are made resulting from clear and diligent examination of the various needs of students. Thus, evidence of the LRP can be viewed through participant voices at a district level that engage a critical consciousness regarding both stance and strategies.

Stance and Strategy: At the District Level

School reform cannot rest solely on the change of individual behavior without an equally aggressive change of the present public education system, which tends to support and maintain the status quo (Schlechty, 1997). A second order change leading to substantial reform is emergent, complex, and a disturbance to every element of the system (Marzano, McNulty, & Waters, 2007). Given these challenges for reform, districts that have committed to LRP recognize that moving from working with cohorts of teacher and administrative leaders to influencing entire school faculties requires a strategic effort. The strong societal norm of "not talking about race" can make members of these cohorts feel apprehensive about sharing the courageous work they are doing. This challenge is being met in several inventive ways in which social justice advocacy becomes woven into the fabric of a district culture and reflected in both policy and practices.

A small suburban school district of the St. Louis area provides an example of this strategic effort to embrace social justice within the culture and practices of the district. The district includes approximately 4,000 students of which approximately 73 % are White, while 27 % are students of color. The district also serves 19 % of students through the Free and Reduced Lunchroom program which is considered a measure of social/economic status. Beginning in 2005–2006, the district committed to social justice advocacy with the target of including their entire staff in LRP.

The superintendent whose role is much like that of a minister, CEO, or chief compliance officer, a Missouri school district, and three school board members presented at the Missouri School Boards Association Annual Meeting. Their presentation entitled *Taking an Active Role in Social Justice*: *Experiences That Lead to Action* included these characteristics for change toward social justice:

- Change requires both pressure and support from leaders. An organization that changes must change beliefs as well as practices. An organization that changes practices without changing beliefs will quickly revert to the old practices.
- Change necessarily causes ambiguity, tension, and self-examination. An absence of mistakes likely indicates an absence of growth.

The district's social justice initiatives have had significant impact upon Black student graduation rates as they have increased from 70 % in 2005 to 92 % in 2008 and again in 2009 to 84 %. Culturally relevant teaching and leading are further reflected through student voice, in which the voices of all oppressed groups are honored and activated. A strong sense of belonging and community for all has been promoted that includes a view of difference as strength and contribution rather than deficit and a need for assimilation. School board members have also participated in LRP and established an Achievement Gap Committee which reports five to six times per year upon progress toward excellence. The superintendent states:

> The social justice training provided by EEC has been life changing for myself and our district. We know each other better and we trust each other enough to talk about the hard things and to work together to find solutions that make our schools and our community a better place for children and adults.

In 2007, another school district of the St. Louis metropolitan area began their journey with nine cohorts of administrators and teacher leaders. From 2007 to 2011, a total of 19 cohorts have completed the program which represents over 400 of the professional staff of the district. This is a large school district of 17,467 students of which 66.7 % are White, 14.4 % Black, 11.1 % Asian, 3.8 % Hispanic, and .1 % American Indian. Approximately 20 % of the students are also eligible for Free and

Reduced Lunches. The district also participates in the Voluntary Transfer program, a state program, which transports inner-city students predominantly students of color into this suburban school district.

These cohorts include all levels of the professional staff, i.e., administrators, teacher leaders, professional support staff, and noncertified employees. The Director of Pupil Personnel/Educational Equity, a central office administrator, leads this district initiative. In an effort to insure continual growth of participant, she strengthened the ally groups with scheduled dates for meeting and provided additional resources beyond the LRP curriculum. To further insure the integration of social justice advocacy, the district designated a lead teacher and administrator in each building to promote social justice initiatives and courageous conversations. The teacher designee of this program is identified as a "Diversity in Action" leader and receives a stipend comparable to other coaches and activity leaders. The director also found that the leadership of the Diversity in Action leaders has:

> … paid great dividends regarding the 'spread' of social justice advocacy work. The common language developed by administrators in LRP became a significant contribution to the goal of eliminating the academic achievement gap.

Another way in which social justice advocacy for educational equity becomes institutionalized is by helping educators see it as a "natural" fit. In one central Illinois large urban school district of over 6,000 students, the principal of the middle school shared the following regarding his leadership role to support social justice advocacy:

> The foundation for social justice advocacy must be embedded in the vision of the leader. Moving along a continuum toward cultural competence needs to be a part of the climate of the school. This is accomplished through education and training (head), deepened relationships (heart), and action (hands).

This school includes a student population that is 60 % Caucasian and 38 % African American and includes 57 % of students eligible for Free and Reduced Lunchroom. The principal benchmarked the essential connection between personal journey and professional practice through their Positive Behavioral Intervention and Support Program (PBIS) data that has been collected for numerous years.

PBIS is a national program which identifies disciplinary action in ways that are uniform, consistent, and effective. Collection of this data over time helps staff members to recognize effective intervention strategies, inconsistencies of practice, and development of a stronger focus upon students in greatest need of intervention. This was the "natural" data used by the principal to help staff recognize disproportionality of race in office referrals.

Research indicates that policy statements regarding disciplinary procedure are generally race-free. However, the implementation of such policy is not free of whatever "stance" the administrator or teacher holds. In one study by the Indiana Education Policy Center, the following was reported:

- White boys are referred to the office for smoking, leaving without permission, obscene language, and vandalism.
- Black boys are referred to the office for disrespect, excessive noise, threat, and loitering (Skiba et al., 2000).

This study suggests that referrals for Black boys are dependent upon teacher perceptions, as none of the reasons for a referral described explicit violation of rules. The research goes on to state:

> Absent support for any plausible alternative explanation, these data lend support to the conclusion that racial disproportionality in school discipline, originating at the classroom level, is an indicator of systematic racial discrimination. (Skiba et al., 2000)

One item used in the assessment of teachers from The National Center for Culturally Responsive Educational Systems asks, "*Is the teacher aware of how his/her own racial identify affects his/her assessment of the student*?" (NCCRESt, 2005). Thus, stance can disproportionately impact disciplinary referrals to the office.

The principal, using PBIS data, was able to support the effort toward racial consciousness within his staff. Through sharing and examining discipline data by categories of behaviors (i.e., "subjective" categories such as defiance, disrespect, and disruption), school staff were able to affect a 37 % decrease in subjective referrals for all students from 2006–2007 to 2008–2009. Additionally, over a 4-year period, the data also included a significant reduction of referrals for special education testing from 2.6 to .1 %. This reduction, at a middle school level, is of significant importance as Black males remain disproportionately identified for special education. Further fewer referrals to the office meant increased instructional engagement, a major element of reducing the achievement gap.

Back to the Parking Lot: Level Two

A second level of the parking lot included customers who arrive respecting the designated spaces by parking in other locations. We would suggest that a majority of teachers, in a similar fashion, arrive at the school house door respecting the decisions of differentiation that have been determined by the system. We also believe that these teachers do not consciously make decisions that harm or exclude students from a positive learning experience but may unconsciously behave in ways that can minimize student growth and achievement. Thus, another lens of evaluating results of the LRP is the voices of those directly involved with instruction and the manner in which this work has influenced their practice.

A Lens of Stance and Strategy: In the Classroom

Christine is a young woman of color, who first participated in LRP in 2003 while in her senior year as an education major at Southern Illinois University. She continued to participate in numerous Educational Equity Consultants programs as she moved in her career from classroom teacher to teacher leader to central office administrator. She is presently working as a doctoral student at the University of Illinois with a focus upon critical literacy instruction for Black boys. The following is her reflections regarding the impact upon her stance as a classroom teacher:

> As educators, we constantly bring our own theoretical stances and frameworks into schools and classrooms. Prior to my participation in LRP, I was not consciously aware of my stance. I was not quite able to clearly articulate the influences or the structures that framed my life. While my stance was the driving force of my classroom instruction, my practices as an administrator and even the actions that governed my personal experiences, I never took the time to either acknowledge or reflect upon these actions or my social behavior with students and colleagues. The fact remains that this is the case for many educators. This then makes it extremely difficult or one may argue impossible to understand the identities and perceptions of children in our classrooms. The LRP program therefore brought light to my stance(s) in education and the theoretical framings that guided every aspect of my personal and professional world. This allowed me to then critically reflect upon my own thinking and actions and in many ways gave me the "critical literacy tools" to "read" myself and positions among local and broader contexts.
>
> With other participants, I experienced both joy and pain, which were both essential as we worked to uncover painful experiences or realities that governed our lives. And it is necessary to do so in this society in our current culturally diverse landscape. Many teachers teach and work with others who have cultural identities different than their own so it is not just encouraged, but necessary that we have spaces to collaborate, share, develop and understand the identities of ourselves and others. The LRP workshop was this space. This space allowed us to "step outside the comfort" or those practices that make life comfortable or easy (often creating few learning opportunities). Learning and engaging one another in uncomfortable spaces gave us the opportune time to learn about ourselves. In traditional education courses and professional development, teachers rarely get the chance to just learn about who they are.

In 2003, Ronald Ferguson's research revealed that teachers' expectations for success were higher for White students than for African American students. In other research, teachers who lack confidence regarding their ability to teach children successfully will tend to implement strategies of speed and precision rather than meaning and understanding (Good, 1987). The elements of expectation and confidence create a unique variable when working with students of color, as noted in one study: negative perceptions and low efficacy held by White teachers were found to be three times greater with African American students than White students (Jussim, Eccles, & Madon, 1996). Expectations, confidence, and efficacy all emerge from stance. The weekend retreat is a first step toward developing a critical consciousness that will challenge these elements of stance as they impact instructional behaviors. However, the continuation of this work is the challenge to bring this consciousness into the classroom and school settings. Another participant voice exemplifies this critical consciousness that balances stance and strategies within the classroom setting.

Sarah is a first year communication arts middle school teacher for a large suburban outside of St. Louis, Missouri. Her classrooms included 61 % White students and 39 % student of color. Included in her class assignments were students identified for special education support as well as those students identified gifted. Students assigned to Sarah's classroom may well reflect the diversity of numerous middle school classrooms throughout the country. In the summer of 2010 prior to her first teaching assignment, she became a participant of the LRP along with 25 other district educators. Her undergraduate coursework included some classes in diversity, but none in her opinion were of great depth. She did do volunteer work with a program through the Columbia Missouri Housing Authority entitled Moving Forward.

She felt that this experience was significant and served as a catalyst for her search for deeper meaning regarding teaching for a diverse student population. She is a White female whose life is that of middle-class suburban experience.

Reflecting upon the LRP program, and in particular the development of a critical consciousness, Sarah regards the experience as a major catalyst impacting her planning and implementing instruction, developing relationships with her students, and striving to insure each students' success within her classroom. In viewing the struggles that adults, including herself, encountered during the retreat while unraveling the complexity of personal identities and racial stance, she felt a strong sense of empathy which she then carried into her classroom. Her feeling was that her classroom could offer the opportunity for these young individuals' to seek a sense of self in constructive ways and her content of communication arts would be their vehicle. Thus, a major attribute of her emerging critical consciousness was not merely empathy – the capacity for caring, but, more importantly, agency – the capacity to act. Her sense of cultural sensitivity within her classroom went far beyond a "study and celebrate" agenda but instead toward activity toward assisting her students in knowing self and relationships with others. Literature, as has been stated, became an excellent tool for this exploration.

Sarah also strengthened her own confidence in speaking with her students about race supported by the follow-up session in which we explore Jane Bolgatz's book (2005), *Talking Race in the Classroom*. Participants examine ways to construct discussions in which issues of race and racism are considered instructive rather than taboo. Bolgatz states that:

> We learn to talk about race and racism by talking about race and racism. Talk gives shape to our ideas and helps us complete our thoughts. When we talk with others – particularly those considered different from us – we can explore creative ways to interact.

All these support Bolgatz's definition of racial literacy: "being able to interact with others to challenge undemocratic practices."

For Sarah, this session along with her ally group (smaller groups of participants' cross-race that meet regularly between follow-up sessions) helped to create a confidence in her willingness to talk race with her middle school students. She states:

> I was not a teacher that was squirming when the subject of race came up in the classroom. Thus, my students didn't have to "squirm" either and we had authentic conversation.

One specific lesson that Sarah developed for her classes represents well her critical consciousness regarding the development and facilitation of instruction focused upon authentic exploration of identity development. With her students, she discussed the difference between the notions of "deserving" and "worthiness." She helped her students distinguish the sources of these human attributes. The students shared that deserving is a benchmark achieved by others' assessment. Worthiness, by contrast, emerges from an internal source, a personal measurement of self.

This became a focus for a lesson involving poetry. Using a number of different sources for prewriting, students began to explore their inner characteristic. Shel Silverstein's poem – *The Invisible Boy* – began the student's exploration of what might be invisible about each of them. Sarah also used *Skin Again*, by B. Hooks, to deepen the exploration beyond the racial identity of skin color. This prewriting activity, a substantial part of the writing process, gave each student some idiosyncratic ways to recognize their personal identity.

Nikki Giovanni's poem entitled *Ann's Poem* gave an excellent poetic structure through which she writes about three themes about her friend Ann. The themes include physical attributes, emotional characteristics, handling difficulties, seeing the world, and expressing joy. Each student then composed their own "I" poem by replicating Giovanni's poetic structure with their own personal themes. A special morning was set aside with invited guest to hear each student share their poem.

The lesson reflected well Sarah's sense of efficacy, high expectations, and a stance that acknowledges the intellectual capacity for success of ALL her students. She exemplifies the balance of stance and strategies as hoped for in the LRP. She continues to explore in numerous ways an instructional approach that mirrors the ideology of Paulo Freire (1970) that literacy is not merely reading the word but reading the world.

Back to the Parking Lot: The Final Level

Our final parking lot reflection were of those who ignore the special needs of designated spaces or deny their need and park wherever they wish. It is unfortunate that this too may describe educators who ignore needs and significant data that would cause them to behave and work differently. As stated previously, these may be individuals who "carry on regardless" or offer a "color-blind justification" for their lack of a social justice conscientiousness. Impacting these individuals in ways that will move their patterns and practices of instruction in a manner that supports social justice advocacy may only be obtained through a careful evaluative process, i.e., one that benchmarks specific behaviors and skills.

A large urban school district in Illinois engaged in a strategic effort to include a social justice emphasis within their existing teacher evaluation process. Their clinical model, much like countless other school districts, includes a preconference/observation/post-conference protocol. Questions were developed by school leaders for use during these conferences to promote the instructional behaviors of equity they wished to observe. When examining how a teacher could use a student's life experience in preparing a lesson, the principal might ask: *How will you connect the lesson plan to the experiences and prior knowledge of all of your students*? During the lesson, the principal might gather data that provides a picture of how the teacher circulates, who the teacher calls upon, for which students does the teacher elaborate upon answers, and who is engaged in the lesson. Many of these questions are not new to a clinical evaluation methodology. But this district was insistent upon making racial consciousness a significant attribute for lesson development and facilitation.

In one end-of-year reflection, a principal noted that a teacher's grade distribution had an unusual racial pattern. Rather than excusing the data, she placed it in front of the teacher and asked that they spend time talking about the impact of this information.

The principal indicated that her LRP experience provided her the “lens” to notice this information and to have the courage to address it.

In Summary

The critical consciousness achieved by participants of LRP regarding a social justice agenda enables school leaders to address all three of these “parking lot” levels. It has caused administrators to act vigorously to formulate policies, strategies, and actions to respond to social injustices that are created by the system. It has engaged educators in a courageous exploration of their own “stance” regarding difference and how that “stance” impacts their instructional practices as well as the relationships they share with their students. Finally, this critical consciousness is further benchmarked by educators who will actively engage other colleagues in an effort to “level the playing field,” so that all students can achieve success.

The Leadership and Racism Program is clearly an effort to go beyond the political agenda of narrowing the achievement gap and, instead, reforming school environments through a social justice advocacy so that the elements that create the “gap” do not exist.

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Chapter 32
Confronting Social Injustices in the Praxis Wetlands Where Research, Policy, and Activism Integrate

Louise Gonsalvez

Introduction

> Another source of critique of social science methods is activist research – an area that has garnered increased recognition in recent years. Debates about the blending of political commitments with scholarly research agendas raise epistemological questions about the nature and value of research as well as political questions about how scholarship might act in conjunction with struggles for social justice. The convergence of both critiques at this juncture calls out for critical analysis. (Mendez, 2008, p. 136)

Researcher, feminist, and activist Gloria Anzadula wrote about highly transformative, cultural spaces she calls "nepantla," and the transformative "nepantlers" who inhabit these in-between spaces that privilege some while marginalizing others (Anzaldua, 2002, p. 1). Her writings about researchers situating themselves in "nepantla" to seek knowledge and assist emancipation led me to the metaphor I wanted to use to write about an important transformative space where theory and social justice action converge. It is a praxis zone where researchers, activists, community groups, educators, and others gather to identify, analyze, and confront injustices (e.g., sex trafficking, water privatization, homophobic bullying) that affect students, communities, and society. I call this place los humedales – the wetlands – metaphorically comparable in their structure and functioning to the coastal wetlands where land and sea, like research and activism, fuse to become a singular space. As with the coastal wetlands (e.g., the shoreline and the ocean), power (e.g., the oppressed and the oppressor) and praxis (e.g., theory and practice) both "mutually intersect and constitute each other" (Johnson & Maiguashca, 1997, p. 37). I will capture how the "praxis wetlands" are an effective place to confront social injustices, and I will reveal how educators can play an important role in addressing social injustices.

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By first sharing my lived experiences (e.g., Gonsalvez, 2005b) of researching and confronting social injustices in the praxis zone (e.g., Freire, 2004) and then discussing the lived experiences of other researchers, I can best present and analyze my claims: that praxis (e.g., research and activism combined) is a fitting place to confront social injustices and that contemporary critical transnational feminist praxis research is a prime example. Maturna and Varela (1992) state, "What we do intend is to be aware of what is implied in this unbroken coincidence of our being, our doing, and our knowing. All doing is knowing, and all knowing is doing" (p. 26). I bring this to your attention because I intend that you "know my doings" and I share "my knowings" (e.g., my social justice knowledge and experiences), as well as discuss the work and inquiries of others working in the praxis zone. Varela, Thompson, & Rosch, (1991) note that "The new sciences of mind need to enlarge their horizon to encompass both lived experience and the possibilities for transformation inherent in human experience" (p. xv), while Stanley (2008) notes that "there is a need for a 'necessary circulation' through first-person accounts and third-person descriptions" (p. 2). Thus, I begin by sharing those experiences that have transformed and shaped my "knowing and doing" of confronting social injustices.

As a rationale idealist (Davis & Davis, 1982), scholar activist (Fine, 1994), and social justice policy writer, curriculum designer, and educator, I actively confront historical, systemic, and emergent social injustices. My research, policy-writing, and advocacy work are seldom compartmentalized, and it is while working in the overlapping praxis zone of research and activism that I do my best work. I've seen how activist research leads to policy changes and subsequently enhances the lives of others. I've researched, lobbied, wrote policy, and developed curriculum on such issues as sex trafficking, water privatization, homophobia, prostitution, dating violence, teen suicide, rape, genocides, and polygamy. My social justice work has introduced me to local issues and taken me to some fascinating places such as Ghana, Ecuador, the Galapagos Islands, South Africa, and China. In my experience, I have found that whether I'm working at home or abroad, the most effective research and activism I do takes place where researchers, practitioners, activists, and those being oppressed work together – in the place I refer to as "the praxis wetlands."

In 2005, I volunteered at Congal Biomarine Station which is a research center situated on the northwest coast of Ecuador. The memory of this experience came to mind when I began writing this chapter and I revisited an article I wrote and began reading:

> I didn't think I'd ever become the machete-swinging maiden of the Esmeraldas. Neither did I think I would be an Eco-rebel invading an abandoned shrimp farm to plant mangroves. Despite ticks, misquotes and fatigue, this Wellington boot wearing volunteer mud-bogged through Ecuadorian swamps and trekked through South American jungle habitat …We all know that the forests are the lungs of the earth but I never knew that the coastal wetlands, as for example the gnarly high rooted mangroves, are essentially the gills to the seas. After an international symposium on wetlands, governments and environmental agencies acknowledged the high importance of these once considered worthless wastelands. Their roots secure coastal shores, the tides exchange salt for photo-plankton rich ingredients, the estuaries are a haven for small marine life and the trees are not only a habitat for wildlife but also a carbon engine for the air we breathe… (Gonsalvez, 2005a, n.p.)

At Congal Biomarine Station, we conducted research on various bio-marine and farming practices while at the same time identifying, analyzing, and confronting issues such as poverty, malaria, and food shortages. We also assisted the locals with microcredit projects, education, and technology skills – the center was situated in oceanic wetlands and we operated as a research/community action site – a place of praxis. Congal Biomarine Station is a place where oceanic tides literally roll in and out of a network of mangrove swamps, and it is also a praxis wetlands, where research, activism, and policy-writing/projects coexist.

A vast majority of Ecuadorian people living in the wetlands love to dance, so in my initial, more whimsical and unedited title, *Manglares*, *Marimbas and Vida Marina*: *Confronting Social Injustices in The Praxis Wetlands*, I more specifically alluded to the manglares (mangroves), the marina vida (marine life), and the women and families, who despite their struggles love to marimba (e.g., a form of Latin dance). Songs, dance, and celebration are often an integral part of work in the praxis zone as evidenced in the following experience I participated in:

> One of the goals of the Congal Biomarine Center is to promote the resurrection of abandoned shrimp farms. In the eighties huge dikes and reservoirs were built to create shrimp ponds that captured the harvests of the seas on a high tide… Conversely, if shrimp farms were completely abandoned then the dikes and ponds were often destroyed to make way for mangrove replanting. To celebrate international mangrove day we joined forces with several other environmental agencies and youth groups to break down the walls of a shrimp farm and replant mangroves in the gooey mud. We couldn't even wear our rubber boots because the mud demons would suction them away. To commend our work at the end of the day, all the restaurants on Muisne Island opened their doors for free meals and the following night the community had a rip-roaring festival which culminated with hundreds of people dancing the night away to salsa, marimba and meringue music. (Gonsalvez, 2005a, n.p.)

Activist research in the praxis wetlands is hard work, exciting, and rewarding. It not only produces new knowledge but it also creates social change.

Using Praxis to Confront Social Injustices

Praxis is the place where theory, practice, and change-making coexist – it includes the particularities of each (e.g., theory, practice, and social justice), and it is a site where reflection, imagination, and social justice are conjoined by a moral imperative to assist the liberation of the oppressed and transform lives. Nagar and Swarr (2010) state:

> Praxis is understood as the processes of mediation through which theory and practice become deeply interwoven with one another. It is often traced back to Paulo Freire's (1993 [1970]) concept of liberation as praxis – that is, the cycle of action, reflection, and action through which human being work to transform their worlds. (p. 6)

The idea of a conjoined praxis (e.g., activism and research) is a highly contested concept in academia, as many feel research and practice should be isolated spaces. But praxis is unique as it can suspend time, place, and material limitations – it is a place where the "sociological imagination" (Mills, 1959, p. 5) can look back in history, forward into the future, and beyond constraints of existing sociopolitical, cultural, and environmental conditions. I will illustrate what I mean in the following recollection, but I must warn you that it takes me a minute to draw upon my experience before I explain how the parts of the story demonstrate praxis in action – theory, practice, and change-making conjoined to confront a social injustice.

In 2007, I was sponsored by the British Columbia Association for the Learning and Preservation of the History of World War II in Asia to participate in a tour of China which included visitations to Nanking where the 1937 genocide took place, to Shanghai where we met and interviewed some of the "comfort women" who had been forced into sexual slavery by the Japanese imperial army during WW II, and to Harbin where live subjects were experimented upon to gather data for biological/chemical warfare. The trip included a series of academic lectures, interviews with victims of human rights atrocities, and visitations to tourist sites. Prior to our departure, we were responsible to attend a series of sessions that introduced us to some of the issues this organization was confronting, and this is when I was introduced to the work of Iris Chang who wrote The Rape of Nanking.

Iris's extensive research revealed that in 1937, Nanking had been the sight of a massive genocide (Chang, 1998, p. 221). A Canadian by the name of Norman Bethune established a safety zone to protect upwards of 300,000 Chinese (Chang, p. 139), and Minnie Vautrin, a teacher, helped protect those in the safety zone and documented events in her diary (Chang, p. 261). What drastically affected me the most was to learn that the Japanese had established upwards of 200 "comfort women" houses where, according to expert Dr. Su, as many as 200,000 women were forced into sexual slavery (Zhen & Linin, 2007). As a point of clarification, I want to note that I previously was sponsored for an Asian Pacific exchange to Japan, so I mindfully remember that I am examining an issue not condemning a particular race. Chang (1998) describes the institutionalized rape that was established by the Japanese Imperial Army:

> Japanese high command made plans to create a giant underground system of military prostitution – one that would draw into its web hundreds of thousands of women across Asia … The first official comfort house opened near Nanking in 1938 … the conditions of these brothels were sordid beyond the imagination of most civilized people. Untold numbers of these women (whom the Japanese called 'public toilets) took their own lives when they learned their destiny; others died from disease or murder. Those who survived suffered a lifetime of shame and isolation, sterility, or ruined health. Because most of the victims are from cultures that idealized chastity in women, even those who survived rarely spoke after the war – most not until very recently – about their experiences for fear of facing more shame and derision (p. 53)

As we had a film crew with us on the tour, we interviewed elderly women who recollected the horrors they experienced as comfort women, and we were fortunate enough to be at Dr. Su's opening of the first comfort women museum in Shanghai (Zhen & Linin, 2007). As a gesture of appreciation, I had offered to raise awareness of this chapter of history and Iris Chang's work by creating resource materials to accompany the new Social Justice 12 course (British Columbia Ministry of Education, 2008) that I had the honor of cocreating. What I didn't realize at the time was that Iris had committed suicide, and later, this weighed heavily on my heart. Iris spent thousands of hours researching what had happened to the comfort women, lobbied governments to seek an apology from the Japanese for what had happened, and raised the public consciousness of a chapter of history that had been omitted from the history books. She delved into thousands of documents, interviewed multiple victims, and worked with various advocacy groups (Jacobs, 2007) – she worked in the praxis zone.

In 2007, 70 years after the event, the documentary "Nanking" was shortlisted for a Best Documentary Feature at the Academy Awards and won the Peabody and Emmy Awards (Stanford Graduate School of Business, 2011) and the movie Iris Chang: The Girl Who Couldn't Forget which was popular in theatres around the world (Miller, 2008). In July, 2007, the United States passed Resolution 121 which essentially asked Japan to apologize for what happened to the comfort women, and in November 2007, the Canadian government passed a similar motion (*CBC News*, 2007, n.p.). I met Iris's parents, attended premieres for the documentaries, and I recently published a book review of Ling-Ling's story about her daughter's life and the bond they shared; the book is entitled *The Woman Who Could Not Forget*: *Iris Chang Before and Beyond* "*The Rape of Nanking*." Praxis work can take us back in history and forward in time – it is an inclusive space where research, advocacy, and lived experiences are conjoined to advance social justice.

In the praxis zones, transformative thinking, transformative processes, and transformative change fuse with the socio-imagination to create change. As an educator, I believe it is important that educational pedagogy has a transformative paradigm and praxis. In 2007, I also traveled to South Africa and researched the prevailing water crisis in the area. I was firmly committed that efforts for educational policy reform must take into consideration a more important priority – many children weren't attending school because they were too ill or dying as a result of waterborne illnesses. As I started to conduct my research, I realized that perhaps the water scarcity narrative that was being reproduced wasn't quite accurate – the more pressing issues were that water had been privatized for profit, and people couldn't afford to pay their water bills so their lines were turned off.

After apartheid policies ended and Nelson Mandela won the national election, the International Monetary Fund and the World Bank lent funds to the country to build dams and distribute water (Gonsalvez, 2007). When the large transnational water companies became dissatisfied with the returns on their investment, they began charging fees for household water, and many citizens couldn't afford to pay their bills (Gonsalvez, 2007). Women began collecting water from cholera-infected watering holes where they risked death to disease or crocodile attacks. Essentially, the new water policies replaced the previous race-based polices, thus re-creating Apartheid conditions all over again. Many researchers, activists, constitutional lawyers, community groups, and global allies sought to make water a human right in South Africa's constitution. On October 8, 2009, the dream was realized (Danchin, 2010, n.p.), and water was declared a human right in South Africa. Later, on July 28, 2010, after substantial resistance from Canada and the United States, the United Nations also declared water a human right (Lui & Naidoo, 2011, n.p.). Research, activism, and change-making (e.g., policies and their implementation) take place in an overlapping space – in the praxis zone. Those working for social justice, whether they be researcher, activist, or policy-maker, can often optimize their efforts if they work together. I have often found that emergent issues have a time frame of their own, necessitating emergent research and quick mobilization to effect change (e.g., policy); the two groups often need to work synchronously to address time-sensitive limitations and opportunities (e.g., legislative decisions).

Change-making never ends, the struggles continue, and they often colonize new shores – praxis work has no real beginning and no real end. After creating two workshops and training nine workshop facilitators, I am pleased that the BCTF now funds "Women and Water: A Feminist Perspective" and "Thirsty for Change: The Global Water Crisis" workshops for teachers around the province. The BCTF also passed policy that prohibits the sale or distribution of bottled water in their offices and at any of their events – they are encouraging all school districts and municipalities to do the same. According to Maude Barlow, the United Nation's first senior adviser on water issues, "More children die every year from dirty water than war, malaria, HIV/AIDS and traffic accidents together" (Barlow, 2009, p. 19). Social justice research, practice, and activism often lead us to discover how systemic oppressions impact certain populations more harshly than others (e.g., water access and women's lives) and spur us to recognize that our behaviors and policies can contribute to oppressions elsewhere (e.g., investing in transnational water companies) and that we often overlook our own backyard. I discovered water issues in South Africa are gendered, race based, and income related. I then discovered the same held true in Canada:

> Drinking water conditions in many First Nations communities are deplorable and unsafe. A 2008 report entitled "Boiling Point!" revealed that 85 First Nations water systems were in a high risk category and that close to 100 communities have 'boil water' advisories on them; the Neskantaga community in Ontario has been on a 'boil water advisory' for 13 years. A CBC documentary in 2006 entitled 'Slow Boil' interviewed residents of various First Nation communities to discover that residents face such conditions as high arsenic levels in their water, water that stains their sinks and toilet bowls orange within forty eight hours of use, and completely contaminated waters where bottled water is the only safe option … A 2005 Commissioner of Environment and Sustainable Development (CESD) report deemed that First Nations communities do not have the same level of protection as the rest of Canada regarding water safety. (Gonsalvez, 2010, p. 8)

The research report "Boiling Point" raised awareness of the deplorable water conditions on Canada's First Nation Reserves (Harden & Levalliant, 2008, p. 6). As a result of research, activism, and education, the Canadian government recently budgeted monies to address the dreadful water conditions on Canadian Aboriginal reserves (Thompson, 2010, n.p.); the amount is a pittance considering the severity of the situation. More research, lobbying, and action need to take place, and I believe researchers, community members, and activists need to work together (e.g., praxis) to help improve water conditions on the reserves.

As well, now that Canada is a signatory to both the United Nations Declaration of Human Rights: Article 31 making water a human right and the United Nations Declaration on the Rights of Indigenous Peoples, Aboriginal groups, research allies, and activist allies should draw upon these international agreements to build new knowledge about the application of these agreements and catalyze corrective action. Speed (2008) states:

> Indigenous people and others are increasingly demanding a voice in what is researched, how the research is conducted, and what is done with the knowledge produced. They frequently require evidence of political solidarities and a clear commitment to producing knowledge that is of some benefit to them. (p. 234)

In the future, praxis-oriented work may be shaped more by those that are being researched and less by "hierarchies that elevate theory, research, and academic knowledge production to a higher plane than method, outreach, community-based conversations, and nonconventional academic writing" and labels them as "methodology," "activism," "atheoretical," or "unscholarly" (Nagar & Swarr, 2010, p. 8). Grassroots research, activism, and praxis may become an expanding field of study, and more research on praxis may become critically important.

Social injustices are often best confronted while groups (e.g., researchers, activists, policy-makers) work together in the praxis lands. Strict binary divides are arbitrary constructs (e.g., activist/researcher, theory/practice, personal/political) that can impede social justice work. A researcher must create paths that maintain the integrity of their inquiry (e.g., validity, reliability, objectivity) but also be aware that they are immersed in a praxis wetlands that shapes the circumstances of the research, researcher, and those being researched. Feminist praxis utilizes feminist theory and critical activist strategies to explore the layers, contradictions, and tensions that arise when confronting social injustices.

Using a Feminist Praxis to Confront Social Injustices

Critical social theory is significant to praxis analysis. "A critical social theory is concerned with issues of power and justice and the way that the economy; matters of race, class, and gender; ideologies; discourses; education, religion and other social institutions and cultural dynamics interact to construct a social system" (McLaren & Kincheloe, 2007, p. 90). As a feminist, I am particularly concerned with feminist struggles and feminist approaches to researching sociocultural, political, economic, and environmental struggles. I respect that feminists have differing views, and I highly regard feminist solidarity which focuses on supporting one another in the struggles to overcome oppressions.

Feminists engage in the contradictions that arise in research and activism, and they endorse processes that facilitate dialogue (e.g., forums, panels, focus groups). Harcourt (2006) states:

> A feminist perspective has two major implications … First, central to the vision must be ending all forms of discrimination against women and, specifically, those forms that impede human rights and foster sexual and gender-based violence. Second, we need to forge a holistic analysis that acknowledges and builds on the multiple struggles of women for sustainable natural resource management, social and economic justice, rights to water and

> land, etc. Our paper is grounded methodologically in what we call feminist praxis – the interplay of feminist ideas and practice – in shaping a vision for the future that can achieve these ambitious goals. (p. 1)

Feminists share a collective purpose to confront "the multiple dimensions of women's oppression" (Harcourt, 2006, p. 2), but they also do more. Harcourt states:

> We are defining feminism as not only the political focus of women's multifarious oppressions, be they in the global South or North, but also to include political analysis, vision, and practice that addresses the power relations between and among women and men in different cultural, economic, and political contexts. Gender analysis is the analysis of the relations among women, among men, and between men and women, relations that imbued also with differences of ethnicity, class, caste, age, sexual orientation, and race. (p. 3)

Feminist praxis is not restricted to oppression against women, but rather, it is inclusive of the interlocking oppressions that affect family and communities. A universal feminist position on all issues does not exist; women from the global South have experienced multiple interlocking oppressions such as colonialism, imperialism, and racism. Often though, feminists share a collective vision (e.g., harm reduction) but they may disagree on how to achieve this for women (e.g., to legalize or not legalize prostitution).

In 2009, prior to the Olympics coming to British Columbia's shores, our Status of Women at the BCTF was asked to respond to concerns that Pivot, a leading non-government organization, was supporting a movement to decriminalize prostitution, and they had secured a high-powered lawyer to do so. These efforts were timely, given that this could open the doors for prostitution rings and brothels in time for the Olympics. Our group gathered reams of articles on prostitution and began to analyze them. Forums, panel discussions, and interviews were set up with prostitutes, ex-prostitutes, various women's organizations, and experts in the field of prostitution. We attended an international symposium on prostitution where we dialogued with experts on the topic from multiple countries. We also sought feedback from teachers in the province. We needed to identify what the social injustice was (e.g., denying women the right to sell themselves, denying businesses the legal right to establish a vibrant sex trade and brothels, legalizing sexual exploitation, and institutionalizing harm against women), and there were competing feminist positions on the issue.

I was fortunate to work with strong feminists who mentored me and taught me about the intricacies of feminist research procedures. They taught me the importance of establishing forums for dialogue, ensuring that all voices had access to the debates, collaborating with other organizations, recognizing and respecting political differences, establishing democratic processes, researching diverse literature (e.g., academic, community based, legal), gathering data (e.g., focus groups, interviews, surveys), involving those being researched (e.g., prostitute support groups), and so many other valuable skills. I believe they gave me strong feminist roots. Ackerly and True (2010) state:

> Feminism is the search to render visible and to explain patterns of injustice in organizations, behaviour, and normative values that systemically manifest themselves in gender-differentiated ways. The variety in feminist research comes from those problems or anomalies

> that provoke the curiosity of a giver researcher; the complexity of those problems; the range of ways researchers choose to explore those, and the theoretical lenses we use to prompt and guide our inquiry. While many theoretical perspectives inform feminist work, feminist scholarship is given theoretical coherence through its roots in feminist struggles. (p. 464)

A common narrative that was being presented by those wanting to decriminalize prostitution was that it would reduce harm (e.g., taking prostitution off the streets and into protective brothels, institutionalizing regular checkups for sexually transmitted diseases, reducing crime and violence), that women had the right to secure such employment, and that women had the right to exercise sexual choice. Our textual research indicated that decriminalizing prostitution had not reduced harm (e.g., sexual assault, sexually transmitted diseases) in countries or states that had legalized prostitution, that it perpetuated violence against women, and that it didn't reduce crime. We tactfully put forth a policy recommendation that our organization oppose the sexual trafficking of women for the purpose of prostitution, presented it to our 700 delegates, and it passed. Our opponent's constitutional challenge in the British Columbia's Supreme Court failed, and we felt our efforts had paid off. I thought it was fortunate that we were able to dialogue with those most impacted by the decision (sex workers) and with groups from other countries (e.g., researchers and writers) who were able to share their expertise on the issue. Working in the wetlands (e.g., with community women's organizations, prostitutes and ex-prostitutes, other researchers, union representatives, educational leaders, academics from other countries) enriched rather than tainted our research. Given the time-sensitive nature of the issue (e.g., the upcoming Olympics and the constitutional challenge going before the courts), we needed to act quickly to collect data, analyze the data, formulate policy, and advocate for our position. The issue brought together national groups, and we were able to gain transnational perspectives on the issue of prostitution and a new topic that emerged from this issue – transnational sex trafficking.

Using Critical Transnational Feminist Praxis to Confront Social Injustices

To orientate my interpretations of the term "transnational," as in critical "transnational" feminist praxis, I first return to a concept that I am more familiar with, and that is globalization. Chang and Ling (2011) state:

> At least two processes of globalization or global restructuring operate in the world political economy today. One reflects a glitzy, internet-surfing, structurally integrated world of global finance, production, trade, and tele-communications. Populated primarily by men at it top rungs of decision making, this global restructuring valorizes all those norms and practices usually associated with West capitalist masculinity, 'deregulation,' 'privatization,' 'strategic alliances,' 'core regions,' 'deadlands'- but masked as global or universal. Like the colonial rhetoric of old, it claims to subsume all local cultures under a global umbrella of aggressive market competition – only now with technology driving the latest stage of capitalism. (p. 30)

The praxis wetlands have become more global, political, and interconnected. Globalization has sped up the rate that financial, social, and media transactions take place and increased global connectivity.

Transnational corporations now often operate outside the jurisdiction of state regulations; some regard it as modern-day imperialism. Some of these changes have created new social injustices and made it more difficult to unmask systemic oppressions. Castles and Davidson (2000) state: “Globalization has destabilized the ‘national industrial society’. The central dynamics of economic life now transcend national borders and have become uncontrollable for national governments” (p. 7). Castles and Davidson also note that “Economic development under conditions of free markets and non-interventionist states seems inevitably linked to greater inequality. Modernization theories claim that higher living standards will ‘trickle down’ to disadvantaged groups, yet it is far from clear that this is happening” (p. 5). As I consider transnational feminist praxis, I consider globalization and how transnational corporations and neoliberal politics are altering many aspects of society, governance, and power. Marchand and Runyan state (2011):

> Under neoliberal governmentality, the state is reduced to a promote of the ‘free market’ leading to the privatization of social welfare and the ‘marketization’ of political and social life whereby populations are to be ‘free, self-managing, and self-enterprising individuals in different spheres of life –health, education, bureaucracy, the professions, and so on. (Marchand and Runyan, 2011, p. 4)

Most neoliberal transnational narratives claim that global/transnational capitalism leads to greater freedom, individual choice, and global connectedness, but they neglect to note the many detrimental effects such as increased poverty, environmental degradation, and cultural erosion that such a masculinized “capitalist penetration” causes (Gibson-Graham, 1996, p. 124). Women and families often are most detrimentally affected by these structural rearrangements, and many feminists are rising in opposition to a “financial industry” which has “been exerting more and more pressure on governments to reduce social welfare and public works spending” (Young & Schuberth, 2010, pp. 3–4).

When one is researching and confronting social injustices today, they must consider that in a transnational world, oppressions may have deep roots, just like the mangroves in the coastal wetlands. Rowley challenges the underpinning messages celebrity-philanthropists use to promote transnational networking. Rather than exposing the systemic inequities that accompany many transnational corporate takeovers (e.g., agribusiness, exporting processing zones, water), some philanthropic groups just encourage people to donate to disadvantaged groups; they neglect to address the transnational structures that are responsible for some of these oppressions. Rowley (2011) states:

> I draw on an anti-capitalist, transnational feminist praxis to analyze the global political economy and the emerging symbolic economy that have become integral to the glamorization of philanthropy within development campaigns such as the (RED) campaign to provide AIDS medication in Africa and the ONE campaign to reduce world poverty championed by pops stars Bono and Bobby Shriver … I show how race, masculinity, femininity, and geopolitics manifest and are variably deployed as categories of seduction in the (RED)

> campaign, aimed at wooing us into believing in capitalism's power to produce global solidarity and to solve rather than exacerbate, human suffering. (p. 78)

Transnational feminist critique is not limited to critiques of women's struggle, by women, and for women, but rather, it is also a theoretical framework, research method, and/or a means of addressing issues that negatively affect culture, society, and the environment. In this case, Rowley challenges the glamorization of philanthropy and misleading narratives equating global capitalism to global solidarity.

Critical transnational feminist praxis often interlocks with the struggles against diverse oppressions (e.g., racism, poverty, homophobia, colonialism, and neoliberalism) and interweaves critical self-reflexivity, collective agency, and transnational networking. Nagar and Swarr (2010) state that:

> Transnational feminisms are an intersectional set of understandings, tools and practices that can (a) attend to racialized, classed, masculinised, and heteronormative logics and practices of globalization and capitalist patriarchies, and the multiple ways in which they (re)structure colonial and neo-colonial relations of domination and subordination; (b) grapple with the complex and contradictory ways in which these processes both inform and are shaped by a range of subjectivities and understanding or individual and collective agency; and (c) interweave critiques, actions, and self-reflexivity so as to resist a priori predictions of what might constitute feminist politics in a given place and time. (p. 5)

Feminist theory, research, and praxis work focus on "women and men in their lives and everyday struggles," and construct "a critical theory that illuminates the dense webs of intersecting power relations that together make up world politics" (pp. 8 Vet).

After, our BCTF Status of Women group dealt with the prostitution issue, another interrelated issue emerged; the issue was sex trafficking and its correlation to major sporting events. It was brought to our attention that major sporting events, such as the upcoming 2010 Olympics in Vancouver, often draw sex traffickers and sex trafficking to the host city. "Human trafficking and sex slavery is not a new problem. During the 2006 World Cup in Germany an estimated 40,000 women were trafficked into that country" (Lopez-Hodoyan, 2010, n.p.). Our research indicated that large-scale international sporting events, like the Olympics, do attract sex traffickers, so we established a workshop on sex trafficking and lobbied the government to monitor potential trafficking. We then worked with the Office to Combat the Trafficking of Persons, and they presented a workshop at our summer conference. The following is an excerpt from an article I wrote in our teachers' social justice journal to raise awareness of the issue:

> The RCMP now estimates that 600 to 800 victims are trafficked into Canada each year, and another 1,500 to 2,200 persons are trafficked through Canada to the United States annually. The US State Department estimates that 600,000 to 800,000 people are trafficked internationally every year, of which 80 % are women and girls, and up to 50 % are minors, while the United Nations estimates that over 700,000 persons are trafficked annually… Trafficked persons are enslaved and exploited both within our borders and internationally. Sex traffickers often target 12- to 17-year-old children as their choice candidates. The children are considered to be vulnerable, sometimes homeless, seen as petty criminals, or at best victims of their environment, desperate for survival. (Gonsalvez, 2009, p. 8)

We wrote policy rationale encouraging the BCTF to support and endorse the Blue Blindfold campaign that is used in other countries to combat human trafficking and created a poster for every school district in the province. The policy recommendation stated:

> The Blue Blindfold Campaign is an internationally recognized campaign that is designed to raise awareness about human trafficking, and educate the public how to recognize and safely report suspected trafficking. The Blue Blindfold campaign slogan is "Open Your Eyes to Human Trafficking," and the blue blindfold that accompanies the message is fast becoming an internationally recognized symbol. There are many anti-trafficking campaigns, but the advantage of this program is that it is part of a larger integrative network that consists of the Canadian Crime Stoppers Association, RCMP and Public Safety Canada. The BCTF should endorse the Blue Blindfold program in principle, promote the program within local social justice networks, and establish a plan to pilot the program in some school districts. (Gonsalvez & Kilbride, 2008, n.p.)

During my PhD program, I attempted to write a paper where I analyzed the potential and suitability of a national Blue Blindfold campaign, but I struggled with the rigors of choosing the most appropriate method, methodology, and theoretical framework, so I just left my informal rationale and recommendation with a member of OCTIP. At this time, I also felt that my hybrid activist-research was on a collision course with positivist ideologies that question whether this praxis approach was legitimate, reliable, or valid. Later in the year, I heard that the Canadian Public Safety Ministry Vic Toews launched the Blue Blindfold program nationally, and I received a letter from him thanking me for my contribution. Our Status of Women team had worked together to research the issue, write policy, campaign, present workshops, and collaborate with other organizations such as OCTIP. We used critical transnational feminist praxis (CTFP) to examine this transnational phenomenon (e.g., sex trafficking) and confront it (e.g., raise awareness, lobby, and develop policy).

Using Critical Transnational Feminist Praxis to Confront Social Injustices

There is a plethora of feminist research and activism taking place in transnational spheres (e.g., human rights, deregulation policies, gender equality), so I have selected diverse examples of these praxis-based projects to illustrate the intricacies of various projects conducted by feminists in the field. Shannon Speed has conducted research on the indigenous community of Nicolas Ruiz, in the Chiapas state of Mexico. Speed (2008) states:

> The tension between political-ethical commitment and critical analysis is always present in activist-research, alongside numerous other tensions: those of power relations between researcher and researched and of short-term pragmatics and longer-term implications. Yet such tensions are present in all research. The benefit of explicitly activist research is precisely that it focuses on those tensions and maintains them as central to the work. (p. 230)

Speed (2008) examines how using language (e.g., Tzeltal) as the "primary identifier of an indigenous person" is problematic for indigenous land claim disputes in the region. During colonization, indigenous "parents purposely did not teach their children the language because they felt it would 'keep them from getting ahead'" (pp. 216–217). By examining texts, dialoguing with locals, and pursuing justice, she was able to identify how basing land claims on language fluency might be effective in some parts of the world, but not in this particular context. Researchers like Shannon Speed engage in research that is personal, political, and promising; they use critical transnational feminist praxis to deconstruct phenomenon, expose systemic (in) justices, and offer recommendations to overcome such injustices.

Linda Peake and Karen de Souza are involved with the Red Thread program in Guyana. Peake and de Souza (2010) state:

> Dogged by low prices for its exports of bauxite, timber, and sugar, as well as internal corruption, it is currently embroiled in a downward spiral of narco violence, criminal activity, and political/ethnic conflict, all of which are on the verge of collapse, and there is general agreement that it is the informal sector – the smuggling of people, gold, and cocaine – that dominates the economy … Red Thread emerged in October 1986; it came into existence through the decision of a small, highly educated and politically grounded group of women who had the information, the resources and the experience necessary for its establishment. (p. 107)

In the early years of Red Thread, the focus of the group was on "income generation projects," but over the years, the work has shifted towards research, advocacy, policy-writing, and community projects that are based on ongoing issues such as poverty, health care, domestic violence, homophobia, and the environment (Peake & de Souza, 2010, pp. 107–108). Many of the ongoing issues in the country are tied to "neoliberal capitalist development and modernization" that takes place in a transnational sphere and which has a North/South axis (Peake and de Souza, p. 109). I have gleaned from their writings that as transnational feminist researchers from the North (e.g., North America), they've had to use critical introspection to formulate their research approach. Peake and de Souza state:

> But we have ended up questioning a much broader set of interests in terms of the power dynamics of the research process itself … and which we think overlaps with a major, and recurring tension between northern academic feminists' reflexive discussions of power in the research process and their (ironic, often unintentional) estrangements from the political struggles of survival in scenarios where people/communities are, indeed, "drowning." (p. 106)

They find transnational praxis brings helps break down racialized and geographic divides and that transnational feminist workers "need to think more deeply about how the research process itself is reproducing hierarchies – academic feminists versus activists and elite grassroots women versus other grassroots women" (p. 113). I posit that CFTP research praxis can lead to change-making whereas strictly isolated academic research (e.g., gazing on the problem without being exposed to the circumstances surrounding the problem) may result in mere representations of the struggle and perpetuate hierarchies that divide the researcher from the subjects of research she/he wishes to engage with.

While an international graduate student, from Cambodia, at the University of Boston, Shirley Suet-ling Tang conducted research with "two Khmer (Cambodian)

American communities in Massachusetts" and completed an inquiry into "how bilingual and bicultural community practitioners have become knowledge producers" (Tang, 2008, p. 239). Her work brought her into close contact with immigrants suffering from mental health issues such as post-traumatic stress disorder. Tang states:

> For example, in the Khmer (Cambodian) American communities of Lowell and Lynn, Massachusetts – the second- and fifth-largest Khmer American communities in the United States respectively – violence and trauma through war and genocide, combined with disintegration of the traditional agrarian, social-cultural-spiritual system of Cambodia and their forced migration and displacement through refugee settlement, have had long-term effects on individuals and intergenerational dynamics. Populations in both cities include those who were resettled here as refugees escaping from Cambodia's killing fields in the early 1980's, together with more recently arrived immigrants, younger generations who were born and raised locally, and a segment that has moved from other cities. (p. 244)

The impact of war, especially on refugees and subsequent generations, is immense. It penetrates transnational spheres, crosses multiple frames of time, and can have strong socioeconomic repercussions (e.g., racism, classism, and poverty). Tang discovered that praxis-based research permitted her "unique research opportunities to support community processes not only to uncover and articulate the knowledge that they possess but also to make their knowledge accessible to others locally and nationally" (Tang, 2008, p. 245).

Tang's graduate studies, Cambodian heritage, identification with struggling members, and position as an international student brought her on an unexpected collision course. A young Khmer American man named, Gift Chea, whom she had be encouraging to finish college at the University of Massachusetts in Boston, was tragically killed at nearby Revere Beach (Tang, 2008, p. 240). The media dismissed the killing as gang related, thus racially tainting Gift Chea and other Cambodian immigrants as a problematic source of regionalized violence. Students at the university mobilized a political protest against the racialized representation and portrayal of the incident (Tang). Tang knew that as an international student her participation in the rally could jeopardize her student visa, but she participated anyways. She received a letter from the university indicating that funds for her tutorial assistant position were no longer available and essentially this meant she would not be able to continue her studies. Tang was functioning in a transnational sphere entangled with political boundaries (e.g., activist/scholar, international student/resident student, university researcher/community outreach worker, Cambodian/American, student/tutorial assistant). She was living, studying, and living in transnational praxis wetlands where political, geographical, and historical wounds (e.g., Cambodian immigrants whose lives had been indirectly or directly affected by war) collided.

Tang offers a number of insights about the role that community-centered research plays in the critical praxis lands and the transnational sphere; her work engaged her in multiple struggles, and her research methods were inclusive, mindful, and intended for building capacity (e.g., feminist in nature). Tang (2008) states:

> Despite the value and potential of their involvement, community practitioners are often relegated to instrumental positions in which their voices and visions are marginalized,

> misused, or completely neglected … This is particularly true for immigrant and refugee communities and communities of color that do not have direct access to networks and resources enabling the practitioners to design, implement, and monitor their own research projects and to integrate their personal, professional, and community commitments more holistically in relation to capacity building and long-term community development … At the core of this theory/practice is the enabling of people from communities of struggle to have direct control and full power over how to explore and use their knowledge, skills, and capacities to imagine and build community. (pp. 242–243)

Like the wetlands that have arbitrary borders (e.g., water/land, swamp/sea, trees/marine life) and perpetual change (waves, currents, tides), Tang's research involved dialectical struggles (activist/research, local/national, immigrant/citizen) that were best understand and researched in an integrated fashion where researchers, practitioners, and those living the experiences sought multiple, creative solutions to overcome struggles (e.g., the praxis wetlands). She has found that her most stimulating place to carry out her work and research "is not at the center of dominant academic and public discourses but rather in those in-between spaces of nepantla and constant transformation" (Tang, 2008, p. 261). I believe researchers need to take one step past the "in-between spaces" narrative to recognize that effective activist research can take place in borderless praxis wetlands where the overlapping of research, activism, community practice, policy-writing, and social change projects takes place. "There are different forms of praxis that are occurring in the world today" (Johnson & Maiguashca, 1997, p. 33); research, activism, and practice exist in a "praxis world."

Jennifer Mendez is a research activist who has worked alongside women's organizations in Nicaragua and the United States to confront sweatshop working conditions, poverty wages, and oppressive labor practices. Mendez (2008) states that "globalization disrupts underlying assumptions of what constitutes society, traditionally defined as the nation state, and destabilizes embedded notions of 'place' and 'community'" (p. 136). A significant amount of her research work focuses on "political and economic globalization and implications for social science methodological and analytical strategies" (Mendez, p. 136). She believes that feminist methods are significant to activist research and that "Feminism(s) have called attention not only to whose voices are missing or marginalized from knowledge production but also to how categories like 'community,' 'the oppressed,' or 'the poor' might obfuscate differences of power and perspective" (p. 140). She notes that the number of "transnational social movements" and "international nongovernmental organizations (NGOS)" has exploded and that they are challenging "the tenets of neoliberal and corporate globalization" (Mendez, p. 141). Her research situates her in the realm of critical transnational feminist praxis – the wetlands.

Mendez's research often brings her into the throngs of political resistance, lobbying, campaigning, and strategic planning. She states, "I seek to write in the space between the practical and the theoretical – the space of strategy" (p. 137). This statement is significant as policy research, analysis, and formulation does not exist in a void, but rather within a milieu of political tensions, power dynamics, and ideologies – the space is seldom neutral, apolitical, or ideologically exempt. Policy-makers are researchers who craft research-based strategies, and Mendez optimizes the use of critical feminist transnational praxis (CFTP) to confront injustices that have a transnational power base.

Mendez's concept of strategy-based praxis is powerful, but I believe it reinforces notions of a practical/theoretical schism. I propose that it is time to reframe the dialogue and the narratives used in reference to research and to claim that essentially all research takes place in a wetlands space that is full of political tensions, contradictions, and motivations and that it is especially important to note this when wanting to confront social injustices by any means (e.g., research, advocacy, community-based projects). Mendez (2008) states:

> Through information politics, movements and NGOs gain influence by serving as alternative sources of information, but for transnational advocacy campaigns to be effective the information must be conveyed as 'rigorously argued cases' based on 'objective' data in order to convince powerful national and international decision makers that change is warranted (Harper, 2001, p. 248; Keck & Sikink, 1998, p. 16). In policy arenas the forms of knowledge that communities and small organizations possess (testimonials, vivencias, popular knowledge) may not be considered 'hard' enough evidence. (p. 143)

Mendez identifies key factor in policy research and policy-making; the process often takes place in a change-making space where patriarchal and transnational narratives prevail – entrenched power dynamics are imbedded in research, activism, and praxis. When confronting social injustices, whether by means of research, activism, or policy-making, one is amidst entrenched structures, processes, and change-making (e.g., Weaver-Hightower, 2008). It is more astute to recognize that it is the wetlands where ebbs, tides, and currents are constant than to construct regimented constructs of binaries (e.g., research, practice). It is in the wetlands that substantial change-making can be strategized and catalyzed and social injustices overturned.

This reminds me of when I did a lot of research on coalbed methane fracturing processes because I was concerned about a new project coming to my small town. I gathered research materials, worked with a local organization called Wildsight, and campaigned for the project to halt (Wildsight, 2010). An ally group called the Citizens Concerned About Coalbed Methane (2010) promoted and screened the video Gasland to support our cause. The filmmaker visited coalbed methane sites and reveals that methane gas got into home drinking water; he demonstrates this by lighting the water on fire. Our coalition was most concerned about the impact of chemicals used during the fracking process to drill down to the gas, and the potential leakage into underground and surface water, but we were also concerned about the impact on our many wildlife corridors (e.g., elk, deer, and grizzly bears). The company sold off their asset and left town; fracking was outlawed in the province of Quebec about a year later (Wu, 2011, n.p.). I guess we weren't the crackpot misinformed granolas (e.g., environmental alarmists) we were construed to be – many of us are just concerned parents and citizens. Our victory was Herculean – we were a small community that had ousted a transnational corporation. Like Mendez, I enjoy strategizing research and using critical feminist transnational praxis – it establishes a way for hard facts to be distilled and community concerns to be heard. Strategizing research enables one to confront social injustices.

Over the last 6 years, I've had the opportunity to visit Vancouver quite frequently, and as I come from a small town, I often attend their many film festivals. I've been amazed with three things: the number of incredibly powerful social justice films that I have watched, the number of powerful social justice documentaries made by female producers, and that I've often had the opportunity to meet the filmmaker. *Sweet Crude* is an award-winning documentary, by filmmaker Sandra Cioffi, that explores the plight of the people residing in the oil-rich Niger River Delta. According to Goodman (2008):

> The Nigerian government, along with foreign oil companies, have reaped enormous profits over the years from the sale of Nigeria's oil and gas reserves, while the residents of the Niger Delta live in abject poverty. The region is plagued by high unemployment, environmental degradation due to oil and gas extraction, and a lack of basic resources such as fresh water and electricity. Nigeria is Africa's number one oil producer, accounting for more than a million barrels a day. (n.p.)

According to the documentary *Sweet Crude*, the Niger Delta now has one of the highest infant mortality rates in Africa, and life expectancy has declined to 43 years of age (Sampson, 2010, n.p.). The equivalent of 50 Exxon Valdez spills has entered the Niger Delta, one spill per year for the 50 years oil companies have been in the region (Vidal, 2010, n.p.). This pollution is causing havoc on the aquatic environment and fish stock and tainting the residents' primary food source.

As a filmmaker, researcher, and activist, Sandy Cioffi captures the struggles of people of the Niger Delta, unlike the mainstream media that shows clips of rebel militants. Her research approach replicates critical feminist transnational praxis – she engages with members of the Delta community to support their efforts to resist transnational exploitation of their lands and resources – the resource curse. According to the Mangrove Action Project:

> Nigeria contains the 4th largest area of mangroves forests in the world, but these important wetland forests are endangered by oil development in the Niger Delta, billions of dollars worth of natural gas, which is extracted along with the oil, is wasted by burning in mammoth gas flares that burn 24 hours a day for years at a time. Some of these gas flares have been burning for almost 40 years, polluting the air, causing acid rain and massive oil spills, ruining the waterways, killing the mangroves and coastal life, harming the health and livelihoods of millions of Niger Delta. (Palmer, 2009, n.p.)

Cioffi researched and captured the social injustices being committed in the Niger Delta – she was operating in a zone of local, state, and transnational conflict.

The praxis wetlands are a place where researchers, activists, and the researched converge to improve lives and emancipate souls. Cioffi used her astute journalistic skills to expose what was happening in the Niger Delta and to confront an injustice. She lobbied to make oil and gas corporations more financially transparent and accountable for their actions overseas.

> With final approval of Dodd-Frank Wall Street Reform and Consumer Protection Act in July of 2010, the United States Congress took historic steps to ensure energy industry transparency and give investors and citizens new tools to hold companies and governments accountable for their actions. Section 1504 of the new law requires all U.S. and foreign companies registered with the United States Securities and Exchange Commission (SEC)

> to publicly report how much they pay governments for access to their oil, gas and minerals. (Lugar & Cardin, 2010, n.p.)

It is unknown how much this bill will impact the lives of the people in the Niger Delta, but it should at least make greed more transparent and further efforts to combat the exploitation of the people in the area. It provides residents of the Delta, and future scholar activists, with data and policy to work with. In a digitized world where growing social inequities abound, the codified perimeters and boundaries of academic research may have to become less rigid to accommodate new ways of knowing, doing, and sharing. It may also become more imbued in political struggles and projects of emancipation like the one in the Niger Delta. Critical transnational feminist praxis is suited well for such tasks.

For my last example of persons exercising critical feminist transnational praxis in their research, I want to turn to someone who recognizes the role that introspection plays in praxis and social justice work. I turn to a dissertation by Lapetra Bowman. She posits that "Trans-Colonial Historiographic Embodied Re/membrance is predicated on revolution, movement, and transformation" and situates herself within a Chicano theoretical framework based on the writings of Chicano theorists such as Gloria Anzaldua (Bowman, 2010, p. v). Anzaldua once wrote, "I am the dialogue between my Self and el espiritu del mundo. I change myself, I change the world" (Anzaldua, 1999, p. 92). This phrase takes me back to Dr. Seuss's story about the Lorax:

> But *now*," says the Once-ler,
> Now that *you're* here,
> The world of the Lorax seems perfectly clear.
> UNLESS someone like you
> Cares a whole awful lot,
> nothing is going to get better.
> It's not. (Seuss, 1971, p. 58)

Anzadula and Seuss's comments remind me of the significance of self-reflection to the research process and activist struggles. Bowman (2010) asserts:

> Through their embodied textuality and re/membrance, Chicana, Latina, and Caribbean women of color assert that transformative revolutionary change begins with the embodied Self, a change which marks a shift from individual consciousness to collective consciousness … This shift begins with the female body, the very site of and testament to colonial, political, socio-economic, geographic, and temporal oppression, repression, and unfathomable patriarchal violence. I argue that through Trans-Colonial Historiography Embodied Re/membrance women can transform their bodies as sites of oppression and repression into active sites of revolution through re/membrance. (p. vi)

By reinscribing, rewriting, reimagining, and reclaiming their life stories, and their culture's historical journeys, women can heal, know, and step towards a new consciousness (Bowman, 2010). Bowman states, "women of color have actively engaged in a methodology of corpeal re-visioning, using their bodies as bridges to healing and knowing, and as stepping-stones towards *Othered* cultural shifts in consciousness" (p.vi). She lists some of the oppressions woman of color have endured as a result of the phenomenon of colonialism: "slavery, displacement, emigration, and racial and cultural discrimination" and post colonialism (p. 2). She claims that postcolonialism is over but the "the imperial residue, ideologies, and dominant paradigms left behind which Third-space subaltern women (and Others) continue to struggle against, to represent the metaphorical wounds left on the bodies, minds and psyches of subaltern Others, and ultimately, to represent the production of Otherness" (p. 3). Critical feminist transnational praxis is not just about researching surface tension and the waters one is immersed in, but it requires critical reflection of one's own embodiment and the embodiment of others – their bodies, minds, and psyches.

Working in the Controversial Praxis Wetlands When Confronting Social Injustices

Critical transnational feminist researchers assertively work in a zone that is plagued by politically motivated and hierarchically constructed border tensions. Hale (2008) states, "Commitments to activist scholarship can leave one feeling torn (if not mildly schizophrenic), stretched too thin, and resentful toward the larger academic community, whose reaction generally ranges from indifference to outright hostility" (p. 14). He claims that the tension "is rooted in the systematic, concerted banishment of collaborative knowledge production" and that the project of "activist scholarship, in light of these experiences, is to effect institutional change, creating more supportive space for the particular kind of research that we do" (Hale, 2008, p. 14). Critical feminist transnational researchers are aware of these tensions, but their collaborative work can motivate them to move beyond canonical limitations – their holistic approach spares them some of the discombobulating isolation and anguish that other researchers in the praxis land might endure.

In reference to praxis, Bullock and Trombley (1998) states, "Marx considered that the split between ideal and reality, between a irrational world and a rationalist critique of it, could only be overcome by the development of a theoretical consciousness among social groups engaged in the practice of changing the real world" (p. 676). This is an important intersection in the wetlands. Praxis is a place where researchers can merge lived struggles, interventions, and change-making; social injustices can be addressed. George Lipitz (2008) states, "In both activism and the academy, we suffer when we do not know enough, when critical reflection becomes too removed from practical activity, and when the imperatives of our daily work leave too little opportunity for analysis, reflection, and critique" (p. 92). He believes that the "execrable social, spiritual, and moral conditions of everyday life in this society" should compel us to examine the potential for change in "institutions, practices, and processes" and that educational institutions should especially heed this moral and ethical imperative (Lipitz, 2008, p. 93).

When we consider arguments for a strict activist/researcher divide, we must be cognizant that such dialectical divisions can reduce the complexities of social justice issues. If one is to argue against any political, social, or environmental engagement while doing research, then shouldn't all forms of collaborative practices such as corporate and/or private funding for academic research fall under the same scrutiny. I believe a wetlands narrative could lead research into a far more inclusive research world and that ethical guardianship is a better solution to ensuring objectivity than drawing lines of demarcation that marginalize those working in the field and/or activists. There are of course many laboratory studies that require a closed system to conduct their research – it is not these studies that I am referring to.

Another complication that contributes to the ongoing struggle to legitimize activist research is the entrenched notions of what constitutes knowledge and knowledge production. Nabudere (2008) states:

> The struggle for self-determination and participation in knowledge production and practice has at a cultural level produced a new understanding of the need to develop new forms of knowledge through self-empowerment of actors. The replacement of vertical power relations between the researcher and the researched with horizontal relations that promote communities' involvement in learning and research ensures that all knowledge producers can, through dialogue and collaborative effort, contribute to building fields of knowledge accessible to all. A hermeneutic approach ensures that all knowledge sources are recognized, and welcomed, and integrated and that all human experiences are taken into account. (p. 85)

As in the scholarship/activism demarcation there are legitimacy warriors that attempt to distinguish knowledge (e.g., tradition, indigenous, modern scientific) not for the purpose of indicating diversity but to marginalize some forms of knowledge over others. As well, there are some forms of knowledge that are acknowledged, but which have less chance of entering the halls of academia. Lipitz (2008) states, "Throughout our lives most of us have encountered serious people in all walks of life who lack the dignity of being taken seriously. Their acts of reflection, contemplation, and creation generally take place without any recognition or reward, in spaces quite unlike Butler Library [Columbia University]" (p. 89). The praxis wetlands, in reality, include underpinning narratives and overarching hierarchies that impact the academic world and marginalize the outside world, and vice versa; more research is needed to understand this as erecting an arbitrary divide to contend with this does a disservice to both.

Those exercising critical feminist praxis in their research are not exempt from the dialectical divisions (activism/scholarship, research/practitioner, knowledge/practice), but I hope the examples I have shared will demonstrate they are navigating the wetlands quite effectively despite these difficulties. I want to close this discussion by sharing one more personal experience. I have selected this example because it ties the issues of praxis, the elements of critical transnational praxis, and the significance of all three of these to educational policy and leadership:

> In 1999, Peter and Murray Corren filed a human rights complaint against the education ministry [British Columbia], alleging the curriculum's failure to reflect queer realities amounted to discrimination by omission and suppression. The Corren settlement in 2006 led to the introduction of a new elective course, Social Justice 12, and the promise that regular curriculum reviews will now be conducted to flag areas where queer content can be introduced. (Barsotti, 2009, n.p.)

The Supreme Court of British Columbia decision led to a call, by the BC Ministry of Education, for a Social Justice 12 curriculum writing team. I was honored to be one of the teachers chosen. This opportunity afforded me the chance to introduce high school students to the praxis wetlands. I worked with educators who specialized in various areas such as law, indigenous cultures, homophobia, feminisms, globalization, administration, and youth activism. Quite often, educational leaders examine pedagogy, performance, and equity issues, but in this case, I was engaged in a process where we would be establishing a course that would teach students how to identify, analyze, and confront social oppressions. Students would be expected to demonstrate respectful and mindful inquiry to catalyze change that would confront social injustices. They would learn about systemic oppressions and have the opportunity to engage in research activism. The course would not only raise their awareness of issues, but it would introduce theory and action as fused elements. As a team, we were permitted to etch all aspects of the course from the start. Decisions were based on discourse, dialogue, research, and consensus. Interest groups had an opportunity to offer their concerns prior to our meetings, after our first draft, and throughout the pilot year. The course is designed to engage students in social justice education on multiple levels.

Social justice education, whether at the school (e.g., Social Justice 12), postsecondary, or community level, is multidimensional and requires self-reflection, critical analysis, and opportunities to intersect and interact with like-minded allies. For example, Deborah Brandt is involved in a solidarity "VIVA project" where nongovernment organizations (NGOs) and progressive universities with "more than four decades of engagement in local, regional, and transnational social movements," commit to Freirean-based social justice projects in such places as Mexico, Guatemala, and Canada. According to Brandt (2010), the VIVA project, like other social justice educational programs, engages "peoples' hearts and minds through transformative process," in social justice praxis experiences (p. 168). Brandt states:

> Both our content and process connect to central issues of transnational feminist praxis such as an intersectional analysis of power in cross-border collaborations, an honouring of multiple ways of knowing and embodied practices, and a dynamic relationship between collective reflection and political action. (p. 166)

Confronting social injustices is multidimensional; curriculum and pedagogy should reflect this. Social justice programs should include opportunities to research, lobby, and confront oppressive anti-democratic policies and structures.

The Social Justice 12 course I helped design is very popular today; it is taught in as many as a hundred schools across the province now. Some students even campaigned and protested to have the program in their schools (Steffenhagen, 2011). When teachers asked me how to teach the section on sexual orientation, I didn't have much difficulty addressing the question. I mentioned the higher rates of suicides by lesbian, gay, bisexual, queer and questioning students (Gilbert, 2011), the bullying and harassment they experience (*CBC News*, 2010), the penalties in some countries for being gay or lesbian (e.g., death sentences, lashings, lifetime imprisonment), and I referred to various human rights legislation. I remember the day a young man shared with me how his father beat him and left him in a field to die because he informed his father he was gay. He managed to crawl to the highway and was rescued. Critical transnational feminist praxis isn't just about research legitimacy. It's about conducting engaging compassionate research to seek social justice (e.g., Alexander & Mohanty, 2011; Merry, 2011; Park, 2007). Educators need to prepare students to identify, analyze, and confront social injustices.

Conclusion

Critical praxis (e.g., research and activism) seeks to illuminate how certain structures disadvantage, disenfranchise, or dismiss the addressees who are being oppressed. Mama (2007) states, "Such scholarship regards itself as integral to the struggle for freedom and holds itself accountable, not to a particular institution, regime, class or gender, but to the imagination, aspirations, and interests of ordinary people" (p. 3). I have described my lived experiences of confronting social injustices in the praxis zone, conceptualized "the wetlands" as a new way of looking at activist research, and introduced you to critical feminist transnational praxis. Calhoun (2008) states:

> Activist scholarship is obvious but worth restating: the world is in considerable need of improvement, and improvement comes in large part by means of social movements, struggles, and campaigns to change public agendas, not merely by the provision of technical expertise to those already in power … it is easy for social science to become too complacent, too affirmative of the existing order … Activist scholarship is one way to make social science useful. But activist scholarship can also make social science better, providing occasions for new knowledge creation, challenges to received wisdom, and new ways of thinking. (p. xxv)

The wetlands are a powerful and effective place to conduct legitimate integrated activist research and critical feminist transnational praxis – they are a place where social injustices can be confronted and new social realities constructed. They are significant to the educational purpose. In the praxis wetlands, we can research; write policy; create curriculum; interact with community members; educate students; ally with organizations; stay informed about emergent and historical injustices; critically reflect about peace, sustainability, and social justice; carefully and mindfully analyze information; integrate social justice into pedagogical and institutional practices; create and lobby for just policies; lobby, protest, or campaign; and use any or all of these avenues to generate new knowledge, defeat injustices, and become change-makers.

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Chapter 33
Schools for Capitalism, Corporativism, and Corruption: Examples from Turkey and the USA

Duncan Waite, Selahattin Turan, and Juan Manuel Niño

To be blunt, education is under assault across the globe. Perhaps it has always been so, but the forces at play today, the environment and social conditions that prevail make this time unique and the threat to education greater than ever. Globalization, especially, allows movements, ideas, technologies, commodities, and even such unintended or nonrational phenomena as disease and social injustice(s) to spread widely and relatively quickly. So, ideas such as those constitutive of the philosophical-social movement known as neoliberalism can spread and take root and have done just that worldwide, that is, globalization has permitted neoliberalism to spread virally. This movement is one, though as we suggest, not the only or the most pernicious, threat to education. We will show how the thinking that lead to neoliberalism (and more) has continued to evolve and take on other attributes. Socio-philosophical thinking has been severely and, in our view, negatively affected by what we term here *corporativism* (as distinguished from corporatism) and corporativist thinking. This, we believe, is a much more serious threat to education and educational intentions—and, by implication, social justice—worldwide.

Why corruption? Why corporativism? And what have these to do with social justice and injustice? And, finally, how are education and schooling implicated in corruption and corporativism and what's the role of leadership?

In brief, and by way of an introduction, corruption and corporativism matter for a number of reasons. Though distinct phenomena, corruption and corporativism share certain characteristics and have similar effects upon the polity, the lifeworld,

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upon society, and the education that is a constitutive part of society. Though not normally thought of in conjunction with social justice and injustice, both corruption and corporativism take from the people and benefit a chosen few—the power elites or the oligarchy.[1] They differ in that, generally, corruption is illegal but corporativism operates, again generally, within existing laws and social structures. The difficulty for us in thinking of corruption and corporativism as being caught up with social justice and injustice may simply be that, besides the fact that, generally, corporativism operates within the law, or on the fringes of the law (if not entirely within so-called ethical bounds), both corruption and corporatism operate in the shadows, and both are what we might term equal opportunity practices, that is, anyone, regardless of race, creed, or what have you, may engage in and benefit through corruption and/or be its victim, the same with corporativism. Also, both are elusive concepts and difficult to prosecute (Noonan, 1984): The victims of the one are coerced not to denounce the perpetrator, and the "victim" of the other is not clear that he/she has been victimized. This last is the point of this chapter: to show how it is that, especially, corporativism acts to subjugate, to victimize and to colonize the subject, and often with the willing consent of the "victim," though the same can sometimes be said for corruption as well. In the worst case, both of these oppressive practices are perceived, when perceived at all, to be commonplace—the taken-for-granted social structure, and, as such, they become hegemonic, or as Bourdieu and Wacquant (2001) phrased it, they become part of "the new planetary vulgate."

The two suspect practices may collide or overlap, as they do in cases involving corrupt practices in schools and education generally, especially when financial inducements spur corruption. Sadly, we need only look to the recent earthquakes in China that disproportionately killed large numbers of poor school children in their schools and the similar devastating results from the earthquake in Haiti to see the pattern: Where large numbers of poor people suffer disproportionately from disasters, corruption rules (*Science Daily*, 2011). *Science Daily* quoted Roger Bilham, one of the authors of a scientific paper correlating corruption to, in this instance, earthquake deaths, to the effect that "'Less wealthy nations are the most corrupt'.… 'We found that fully 83 % of all deaths from earthquakes in the last 30 years have occurred in nations where corruption is both widespread and worse than expected'" (para 7). Generally, standard of living (or GDP) is directly related to corruption, that is, the more corrupt a society, the poorer the people are and, again generally, the more unequal the wealth distribution.[2] Less corrupt societies tend to be more equal. Usually the most vulnerable members of society are the first targets of corruption and corrupt practices and are their victims. And who are more vulnerable than school children and the teachers, the public servants who are tasked with their care?

Though perhaps less tragic are cases where the relations among capitalism, corporativism and corruption are less overt. (Many of these types of cases will be taken up and discussed in more detail below.) One quick and recent example was revealed by a report in the *New York Times* (Winerip, 2011b). It seems that the Pearson Foundation, the nonprofit arm of one of the largest educational publishers in the USA, is in the habit of inviting sitting state school superintendents with whom the publisher has business on expensive all-expenses-paid junkets to exotic locales—Rio, London, Singapore, and Helsinki—ostensibly for educational purposes. The report cites the $138 million contract the State of Illinois has with Pearson, the $110 million contract it has with the State of Virginia, and the $57 million contract it has with the State of Kentucky, as examples: "All three of their commissioners have attended the conferences" (p. A15) at the Pearson Foundation's expense. The report quotes Marcus S. Owens, a former director of the Exempt Organizations Division of the Internal Revenue Service, as saying: "The Pearson conferences fit the same pattern as the influence-buying junkets that the convicted lobbyist Jack Abramoff arranged for members of Congress" (p. A12). Schemes such as this, and the others we will detail below, cheat the citizen, the taxpayer and, in the end, our nations' school children (Meier & Griffin, 2005). This to us rises to the level of the most grievous injustice.

In issuing this warning about the threats to education and the social injustices that follow, we are taking up Gert Biesta's (2011) distinction between education and learning. For Biesta, as for us, education is more of a teleological practice, concerned with aims and purposes (cf. Dewey), whereas learning is not necessarily so. According to Biesta, learning and the language of learning (in his terms, *the learnification of education*, p. 5 [emphasis ours]) "lacks an explicit engagement with the question of ends" (p. 4). He held that:

> this does not mean that educational practices framed in terms of the language of learning are without ends; it just means that they lack reflection and judgment about ends, and thus tend to be directed by so-called common sense or even populist ends. The language of learning thus makes it difficult if not impossible to take responsibility for the direction of education.

Learning and, in Biesta's terms, the language of learning are thus susceptible to being highjacked by, in this case, a neoliberalist agenda. This is done so unreflectively, almost incidentally, that learning and the language of learning gain incredible force for being positioned as commonsensical (and therefore nearly indisputable). They are thus easily co-opted and made an instrument in political educational agendas, forcing the public's and the policy makers' attention onto such educational reforms as increasing efficiency, school and teacher effectiveness, and the like. As examples, in the state of Texas, there are state-level initiatives that employ relatively simple and fundamentally flawed formulas assessing school district efficiency in using state monies, according to high-stakes test score gains divided by levels of expenditure per pupil. Increasingly, districts are being held accountable for the results according to this formula. Teacher merit pay systems, and threatened use of such systems in colleges and universities, are other examples of simplistic thinking as an outcome of accepting the language of learning as commonsensical. Our point being that such acceptance occurs at an ontological level.

In what follows, we shall detail characteristics of what we term corporativism. We will sketch the genesis of corporativism in a bare bones genealogy of the concept. Having accomplished that task, we will demonstrate how corporativist thinking and the policies and procedures it unleashes affect school, schooling, and education. We will especially draw upon examples from the USA and from Turkey to illustrate our points, though we will examine global or international (transnational) examples as well. These examples were chosen for their explanatory power—as telling examples of the issues we wish to highlight—and as they are examples, social conditions, with which we are most familiar. Turkey and the state of Texas in the USA serve as exemplars—the former as a bellwether and the later a cautionary tale: Turkey has a vibrant economic and political engine, making it a major player in the region and across the globe; Texas is perhaps well known as the home of the former US president, George W. Bush, who took the Texas model of school accountability, the so-called Texas Miracle, and was able to impose it nationally in the form of the No Child Left Behind (NCLB) federal education policy—an accountability system which has had profound effects on national and international education policy. As examples, both Turkey and Texas are indicative of and, at the same time, influential in the broader policy and practice contexts. Many of the examples we draw upon come from the domains of commerce and business (i.e., capitalism), as corporatism, neoliberalism, and corporativism appeared in those domains initially and only later affected education, educators, and educational leaders.

A Brief History of the Evolution of Social Thought as It Pertains to Education and Educational Management/Administration/Leadership

From time immemorial, humans have traded with one another. Often, surplus was traded for other necessities. When basic wants were met, surplus was frequently converted into capital (Ferguson, 2008; Simmel, 1978). The world's population grew. People became more specialized in their skills—coincident with the rise of hamlets, towns and cities, workshops, and then shops arose. Trade was one of the earliest and easiest ways to amass large sums of capital (incidentally, trade fueled exploration and exploitation). Marco Polo was driven to find a trading route to China (The Opium Wars in China are a case in point of commercialism coupled with imperialism, which itself relied upon militarism). The East India Company pursued trade on the Indian subcontinent and benefited from wanton English imperialism. Likewise, the Hudson Bay Company and others led and in turn followed British, Spanish, Portuguese, Dutch, and French imperialism into the Americas. Other colonizing countries and their leading merchants operated similarly. Sometimes missionaries and other proselytizers or religious zealots were the first non-indigenous people to venture into certain areas of the world; often they followed upon the heels of the soldiers and their imperial armies.

The burgeoning population in Europe, China, Anatolia, and elsewhere contributed to the rise of, first, great cities, and later, to city-states. Of course, it is thought that cities arose as islands of relative safety, where people who worked the land by day could withdraw within the city's walls at night for safety from marauding bands. Over time and at different rates specific to the particular region, country, or locale (Fukuyama, 2011), city-states coalesced though conquest or alliance into something that resembles the countries we know today. This process was aided by relatively new war technologies such as gunpowder and steel and by improved modes of transport (e.g., roads, horses, sailing ships, wagons, and other vehicles) (Diamond, 1999; Sale, 1990).

Concurrent with the rise of the city-state and state, in some cases preceding it, religions grew to become more and more organized and in many cases increasingly bureaucratic (hence, the cleric becomes the clerical). Throughout most of recorded human history, we see these three forces in dynamic interaction—the church/organized religion, commerce/business, and the state/civil society (Waite, Moos, Sugrue, & Liu, 2007; Wallerstein, 2005). Historical epochs and particular locales may be characterized as being especially influenced by one or another of these forces, or a combination of forces (Fukuyama, 2011). Often, one or another social institutional force predominates, though they all are always in dynamic interaction. There are other forces that contribute to change in the world, and to the tenor or lived conditions of a particular milieu. Lately, another human invention/construction has gained such force as to unsettle the established triumvirate of social forces and compete for recognition as a human/historical change agent; that force is that which is occasioned by technology, its development or invention, adoption, and the effect that technological adoption has upon the lived world of human association.[3]

Changes in Organizations and Roles Within Them

As the world population grew, forms of human association became more complex. In government and civic society, as we have seen, families and clans gave way to tribes, which gave way to nations and city-states (e.g., the Iroquois Nation, the Inca, or the Aztec in the Americas before colonization), which, in turn, gave way to the modern state and associations among states (e.g., the UN, the G8). The trajectories which the development of these governmental entities have taken, as Fukuyama (2011) noted, have been dependent, in part, on the particular historical antecedents of each (i.e., the roots of British jurisprudence are distinct from those in China, e.g., and the resultant sociopolitical order is similarly distinct).

Likewise, church and business associations grew in complexity (and here we are especially interested in the organizational structure and the roles within these organizations). As organizations grow, several interesting phenomena occur: increasing bureaucratization; increasing role specialization, at least for the worker; increasing generalization of role for managers, CEOs, and "leaders"; a potential/tendency for organizational goal displacement (i.e., mission creep) because of, principally, transaction costs (Shriky, 2008; Waite, 2010); and, coupled with this last, increase in the self-preservation impulse of the bureaucracy, the organization, or the business as a whole (Weber, 1958).

The Rise of the Manager

As businesses grew in size—reflecting the rise in national and global populations and increased access to far-flung resources and markets, business and other organizations underwent profound and fundamental changes. Increased bureaucratization has already been mentioned above. Increased organizational size and bureaucratization, generally speaking, resulted in more and more refined hierarchies and hierarchical levels within all types of organizations, not just businesses.

Some 50 years ago, in *The Organization Man*, Whyte (1956/2002) described the social ethic which he thought had come to dominate at that time. He termed it a social ethic in order to emphasize the unitary nature of the social phenomenon, one he described as an American ideology. He claimed that "the 'professionalization' of the manager, for example, and the drive for a more practical education are parts of the same phenomenon" (pp. 6–7). He asserted that "the trainee believes managing an end in itself, an expertise relatively independent of the content of what is being managed" (p. 7). Elsewhere (Waite et al., 2007; Waite & Nelson, 2005), we have done a more thorough job of deconstructing exemplary cases of the rise of the manager, including, especially, the case of Jack Welch, the former Chief Executive Officer (CEO) of General Electric, who, though a manager, came to own a substantial portion of that company's stocks and received such "bonuses" (or perquisites), that the revelation of the excesses of his compensation added fodder to the anti-elitist backlash of the time.[4]

That the manager has risen in importance, not just for the company, organization, or institution she/he manages, but for society at large, can be seen in the fact that, in US sports federations (i.e., leagues, such as Major League Baseball [MLB], the National Football League [NFL], and the National Basketball Association [NBA]), the commissioner of the league often is among the highest-paid personnel in that league, despite the fact that players' huge salaries and bonuses are more often in the headlines.[5] Evidence of a runaway power usurpation—the rise of the manager and his/her power as opposed to that power being attached to other positions or distributed in a more egalitarian manner—have been brought into the open by the recent FIFA (Fédération Internationale de Football Association) bribery and vote-solicitation scandals (Hughes, 2011), and the International Olympic Committee (IOC) scandals involving the state of Utah's bid to host the games before that (Longman, 1999). Also, it is telling, that the past president of the IOC insisted that people address him as "Your Excellency."

The effects of managerialism can be felt on at least two different levels—within the organization itself and throughout the wider society or societies that adopt this form of thinking, this form of organizing. Truly, different organizations may adopt or may reflect different organizational models, some more hierarchical, some more bureaucratic, and some less (Waite, 2010).[6] Wherever managerialism takes root and where it comes to dominate, it affects how one frames issues, how one approaches problems. In effect, application of a managerialist form of thinking causes leaders and others to frame issues, problems, and so on in management terms and to think how best to manage them. This narrow conception of the lived world is what we have referred to elsewhere as *managementality* (Waite & Nelson, 2005)—a play on the Foucaultian notion of governmentality.

Managerialism, Neoliberalism, Corporatization, and the Rise of the Corporate Model

The world's population grew. Fueled by technologies, capitalism, and globalization, organizations grew, too, and became more complex. Indeed, the organization of and the organizations within each and every field—the Church, the state, and commerce—became more complex, leading eventually to the corporation.[7] Fukuyama (2011, p. 449) noted how "the idea of the corporation—a permanently lived institution with an identity separate from the individuals who made it up—arose initially as a religious organization and not for commercial purposes."

As the historical record bears out, the corporation and its adaptive organizational structure were well-suited, not only to business, but to governing as well, or policing in Rancière's terms (2010). According to Rockhill (2004), for Rancière, "the *police* … is defined as an organizational system of coordinates that establishes a distribution of the sensible or a law that divides the community into groups, social positions, and functions" (p. 3, emphasis in original). The idea of the corporation is fluid and flexible, and this serves it well. Its mission is relatively narrow, unlike governments' or governmental institutions', that is, a corporation is concerned with generating wealth for its owners (founding members and shareholders). The state, on the other hand, not only collects rents through fees and taxes and the like (Fukuyama, 2011) but is also responsible for providing services to its citizens. Currently, the state-commerce balance, dynamic, or equilibrium (disregarding the role of the Church for the moment) privileges business, that is, in the Western world at any rate, the state is in a weakened position, while business is strong (we write "in the Western world" as many states, especially in Asia—e.g., China, Philippines—practice state capitalism, whereby the state is often the largest, sometimes the only, business enterprise permitted to operate internally and externally).

The more tightly the corporation adheres to its mission and concomitant image, the better, more successful it is perceived to be. Image and brand are vigorously cultivated and protected. Often, the brand or image may be more valuable than the capital assets held (e.g., IBM). The brand and branding are integral to corporate identity, and this affects internal affiliation and loyalty, external commitment and brand loyalty, and sales, the so-called bottom line. Image matters.[8]

The development of further complexity, in this case at the organizational level, has resulted in the corporation becoming the preeminent organizational form today. This is evidence of what we term corporatism—the most basic level of corporate colonization of the lived world. In a nutshell, the corporation, the corporate form, is ubiquitous: corporations dominate most all fields: In medicine, they are represented by the HMO; in the fifth estate, by media conglomerates such as News Corp and the Washington Post. These commercial behemoths often grow far beyond their original core area or market; this is called diversification. For example, the Washington Post Company, a newspaper, acquired Kaplan Inc.—ostensibly a for-profit education provider—and this education unit of the mother company has accounted for most of the phenomenal profits realized since its acquisition in 1984 (Lewin, 2010). That corporations have become perhaps the most ubiquitous organizational form, worldwide, may be behind the gaff uttered by the front-running Republican in the most recent US Republican presidential primary contest, Mitt Romney, when he said, in response to a heckler's taunt, that "corporations are people, my friend" (Rucker, 2011, para 5).

The idea or conception of a corporation is evolving, in flux. Through incorporation, individuals are able to limit their own individual liability—one of the main advantages of the corporation. As Fukuyama (2011, p. 449) asserted, the corporation is "a permanently lived institution with an identity separate from the individuals who make it up." (Leveraging individual wealth is another distinct advantage.) Accountability is one of the watchwords of neoliberal politics and rhetoric. However, through incorporation, individuals, whether shareholder or CEO, can manage to escape being held accountable, at least in the democratic sense, accountable to the *demos*, the people (see Biesta, 2010), though they may still be somewhat accountable to shareholders.

Accountability is polysemic—variously defined and differentially realized in different contexts or domains (Biesta, 2010; Waite, Boone, & McGhee, 2001). In line with the twisted logic of neoliberalism, accountability is conceived of and practiced differently in, say, the business realm than it is in education. It's not so much that accountability in these different domains is practiced differently as much as it is the case that what may have been, in principle, the same practice (in this case, accountability), when superimposed onto phenomena in totally different realms, effects totally different outcomes. For instance, Biesta has shown how accountability has become transmutated within a neoliberal, consumerist discourse. In the business, consumer capital realm, this is business as usual. However, transposed into the educational realm, this concept and/or practice makes the school-parent relationship into that of a provider-consumer. As Biesta has demonstrated, the relationship between the school or educator and the policy maker is radically transformed, as is the relationship between the parent or public and the legislator. In place of a democratic relationship, it morphs into a consumer relationship, and the only accountability practice-able is that expressed through "choice"—a one-sided, aggregative, nebulous form of accountability. In this way, lawmakers, legislators, representatives, and state education and other policy-setting agencies duck responsibility or skirt being held accountable. The state and its functionaries become simply other providers in a world of such providers. This is one reason that it has been so easy to open public education to for-profit enterprises: Education is no longer seen as a public good, only a service, which can be provided equally well by any and all, and, in the neoliberal logic, the cheaper the better.

Each and every type of organizational form is more than simply a contingent product of situational exigencies, a product of the times, so to speak. They develop alongside, parallel, or concurrently with major philosophical and theoretical movements (evidence Keynes, Smith, and Friedman) or, once established, develop undergirding principles, tenets, and ways of operating, which being ideational, tend to become ideological and even dogmatic (Morgan, 1997).

Table 33.1 Commonalities, complementarities, and characteristics of neoliberalism and corporativism

Neoliberalism and corporativism	
Neoliberalism	Corporativism
Privileges markets, free choice, entrepreneurial competition, and individual initiative in addressing social needs	Issues of identity (e.g., branding): individual, personal identity attached to the corporate
Positions education as a resource for global competition and private wealth accumulation, as an arena for business	Business hierarchical
More stringent "accountability" and increased consumerism	Corporatist culture (i.e., behavior and ways of thinking)(at an ontological level); business/ corporate language
	Imperial hubris ("*El Rey*")

Sources: Gronn (2003), Sleeter (2007), Waite (2011)

The rise of the business corporation (Whyte, 1956/2002) and globalism together precipitated the spread of the financial-ideological tenets of what we know today as neoliberalism (Table 33.1). Others have done a much more thorough examination of neoliberalism (Gronn, 2003; Harvey, 2005; Sleeter, 2007) than we are able to in the space permitted here; however, we would like to briefly mention some of the tenets of the neoliberal financial philosophy in order to advance our thesis.

Neoliberalism

Briefly, neoliberalism and its adherents prize the so-called free market, which they believe to be an apt organizing (and self-correcting) global system. An extension of these free market ideals and mythologies is the neoliberal concept of choice, a concept appropriated and applied, especially, to school attendance. A logical extension of these two beginning, fundamental principles finds, in both the USA and in Turkey, adherents of neoliberalism criticizing the state and its system of free public schooling as monopolistic, suggesting that market capitalism and the introduction of more for-profit schools is somehow more democratic (at the primary and secondary level these for-profit schools are called charter schools, often subsidized with public education funds).

Competition, especially in the marketplace, but extended to other fields as well, is a hallmark of neoliberalism. An unreflective belief in individualism (individual initiative, responsibility, and stringent forms of accountability) complements the neoliberal belief in competition. Taken to the extreme, such beliefs make the individual responsible for his/her condition, predicament, and/or situation, absolving the state or other social structures (e.g., socioeconomic structures of wealth distribution) from any social responsibility whatsoever. Again, in the extreme, a radical neoliberal position may posit that the student and/or his parent(s) is (/are) solely responsible for the provision of his/her education, not the state. In the workplace—including schools—under conditions of neoliberalism, the individual is responsible for his/her further professional development (Billett, 2006), not the company or school organization. Neoliberalism credits the successful individual with his/her success, ignoring and neglecting any and all social conditions (e.g., infrastructure, banking, monetary, and taxation policies that privilege the wealthy) that may have contributed to that success and absolving the successful individual from of any responsibility to the collective.

At the hands of neoliberals, education and its provision are commodified. Education, rather than being seen as a provision of a public good, becomes a market (Biesta, 2010), prone to plunder and pillage by corporations and manipulation by interest groups (often with ulterior motives, some financial, some ideological) and political alliances. Education is marketized. As we have shown elsewhere (Waite, Rodríguez, & Wadende, in press), education and educational reform are businesses and are dealt with as such by policy makers, at national and international levels.

The continued erosion of public, governmental support for education at all levels—preschool, primary, secondary, tertiary, vocational, and continuing adult education—makes of private, for-profit education a more viable option. At elementary and secondary levels, this gap is being filled by, in the USA, charter schools and for-profit schools. At the university level, the market is being flooded with for-profit institutes, vocational programs, colleges, and universities, of both the online or virtual and brick-and-mortar varieties. While the provisions of alternatives might appear attractive, the diminishment of governmental support coupled with the dramatic rise in tuition cost has placed college and even further technical training out of the reach of many (Kristof, 2011). Education is becoming less of an avenue for social advancement, if ever this was the case.

A draconian accountability regime is a result of the application of neoliberal ideologies in education, as market-driven, technicist ideologues, neoliberals push for more “efficiency” in education (Biesta, 2010). Gone is talk of “good” teachers, replaced by efforts to find and reward effective or efficient teachers (often rewarded through market-driven compensation schemes, such as merit pay, pay-for-performance, so-called value-added performative measures and the like). Such heavy-handed, mindless accountability makes workers—teachers and others—subservient to data, data collection, data analysis, and the results of such analysis, often in name-blame-and-shame highly visual public displays. The publishing of league tables, assessment results, high-profile school closures, and the threat of such closure, often on a massive scale, ensures that a climate of fear and intimidation prevails throughout our schools and that such fear, coercion, and defensiveness guide decision making at the school, district, and state levels. Such a climate fear and an obsession with numbers—setting unrealistic goals in an environment of diminishing public resources—guarantees that many will game the system, as happened throughout the Atlanta public school system (Winerip, 2011a), and fosters corruption and impression management (i.e., performativity), rather than authentic education (Waite & Allen, 2003; Waite et al., 2001).

Corporatism and Corporativism

The rise of the corporation as the dominant organizational form throughout the developed world, coupled with globalism and neoliberalism, ensured that corporations would move into the domain of education. The examples are ready to hand: Kaplan, Inc.; University of Phoenix; KIPP academies; and Harmony Schools charter schools are among the most visible, having been in the US national news of late due to some controversy surrounding them, whether it be questionable legal practices; lending, usury, and misrepresentation; charges of cronyism; or US xenophobic (protectionist) to reactions 'foreign firms' entry into the market.

To us this is unremarkable—the fact that corporations, both US and multinational, are eating up more of the US educational pie. This simple fact is what we refer to as *corporatism*. Rather, what we are interested in is how this has affected, how it is affecting, our lived world, our relations, our culture, and our minds, at both the individual and collective levels.

The growth of the corporation and the deep cultural, linguistic, psychological, ontological changes associated with this is what we call *corporativism*. Where the term corporatism may result from a more sociological analysis of the global lived world, corporativism (borrowing from and building upon corporatism, neoliberalism, and other related concepts and being a hybrid form) is a more radicalized version of that which preceded it—including, but not limited to, capitalism, bureaucratization, managerialism, corporatism, and neoliberalism, among others.

Table 33.1 exhibits some of the characteristics we have found that distinguish corporativism.[9] At present, the distinguishing characteristics of corporativism, as denoted in Table 33.1, we have found to be:

- *A complicated, complex construction of identity*—both for the overall organization, its parts, and the individuals who contribute their labor (physical, mental, emotional, psychic, etc.). Identity is dynamic and its construction and maintenance are iterative and reciprocal.
- *Corporate, bureaucratic structures*—including business hierarchical, status and dominance hierarchies, silos, departmentalization, and other structural means for dividing the turf, the rewards, resources, and loyalties and for collectivizing these and other processes and outcomes.
- *A corporatist culture*—collective and individual orientation to the corporation, with variations within and throughout.
- *An imperial hubris*—collective and individual arrogance, superiority, privilege, a sense of entitlement and exceptionality, and impunity.

We acknowledge that this list is not exhaustive, as there is still and yet much to mine as regards corporativism. We submit this as a first, early installment of work yet to come. As these characteristics (and our analytical concepts) are intertwined and mutually supportive, we opt not to discuss each of them one by one, ad nauseam. We will, instead, examine the corporativist characteristic of imperial hubris in more detail and, in this way, draw the other characteristics into the discussion and give them shape.

Imperial Hubris

El Rey is a popular Mexican folk song, one whose lyrics express precisely what we mean by imperial hubris. The song, though ostensibly one of hardship and privation, is also one of hope, drive, and even defiance. The lyrics to the song contain this refrain: *Con dinero o sin dinero, yo hago siempre como quiero, y mi palabra es la ley.* ("With money or without money, I always do as I please, and my word is the law"). Briefly, we see this attitude and disposition when, for example, the CEO of BP stood in front of television cameras during the BP Gulf of Mexico oil disaster and whined about wanting to get his life back and condescendingly referring to the "little people" affected by the spill. Examples abound. It would be one thing if this is all it was: the chief executive of a company or multinational corporation possessed of a swelled head. However, and as we shall show, under conditions of corporativism, this attitude can potentially invade the collective and collectivities, at all levels of society and in all social domains, not just business. For example, again briefly, this attitude, that of imperial hubris, was on display (and with tragic consequences) when Blackwater mercenaries rolled into Nisour Square in Baghdad in 2007, opened fire and killed 17 unarmed civilians. Whether or not they and their "superiors" are ever brought to justice, such actions likely indicate that the perpetrators rationalized their actions, during and afterward, from a superior, privileged position, one which they expected would provide them with impunity.[10]

Imperial hubris is more than a disposition of an organization or a personality trait of an individual or a manifestation of such: it is an orientation (i.e., it is ontological), one which permeates organizations, institutions, and society at large. That such an orientation is societal is evidence for our assertion that corporativism (as opposed to corporatism and/or neoliberalism) has become ontological, has permeated and, you might say, colonized the lifeworld and our ways of thinking. Imperial hubris is socially constructed, again a ramification of its being ontological.

It is not the case that everyone in an organization, everyone throughout the world exhibits imperial hubris. Indeed, owing to the definition of the term/concept and the wide variation in people's positions/positionality, this is impossible. However, it is possible and, we suggest, extremely likely, that nearly everyone throughout the world orients to the legitimacy of imperial hubris. And therein lies one of the dangers. (True, some independent thinkers, democrats, radicals, anarchists, and others strive for and put into practice more egalitarian social relations and structures.) Nor is it the case that corporativism is monolithic, as there are always counterdiscourses in circulation (witness the Occupy movements in the USA and elsewhere), however strong or weak these may be (de Certeau, 1986). We acknowledge this. However, our point here is that corporativism is both the primary contemporary form of social organization and the predominant social organizing principle (i.e., it overshadows competing forms and discourses in the structural and the ontological domains). Absent an awareness of these forms and their rise, we may, in our blindness and apathy, be run over by them, swallowed up. We may even be inadvertently hastening their dominion over us, their hegemony. According to our thesis, corporativism is, in most cases, organized so as to orient toward and rely upon a leader (as an individual or an in-group) as the titular, hierarchical ruler or sovereign of an organization. One of the dangers in this is that in doing so, we invest so much in that leader and grant him/her so much power over us, that it is subject to abuse, manifested in imperial hubris, a corporately generated exceptionality. This exultation of the leader diminishes all others, as status and rank are the stuff of hierarchies (Waite, 2010), and through a hubristic lens, we all look puny and exploitable. Now, ant-like, we become serfs (see Waite, in press).

Corporativism: An Example

Perhaps a simple example will suffice in illustrating our point—that is, how corporativist thinking (i.e., a corporativist ontology) has colonized all other domains, especially those represented by the major social forces discussed earlier. We are aware of at least two ways that such a profound, radical, and fundamental change might occur between and across domains: (a) a frontal assault, wherein one domain simply encroaches upon another domain, and (b) a viral infestation, wherein individual members of a domain are convinced, seduced, swayed, and turned (brainwashed is perhaps too strong a word) and accept the legitimacy or superiority of another domain or its fundamental tenets and at a subconscious level.

Our example: In tertiary or higher education contexts in the USA, analysis of recent trends (Center for College Affordability and Productivity, 2010) reveals that the number of university and college administrators continues to grow at such a pace that it is projected that the number of administrators and their support staff will soon surpass the number of faculty. Simply put, by 2014, administrators and managers will outnumber faculty. What will this mean for university governance and goal setting? How might this shift in balance affect, for example, the assessment of faculty and of programs? How might this shift in numbers (a shift in the balance of power, from the intellectual orientation of faculty to the pragmatic, managerialist ways of operating of administrators and managers) affect rights and responsibilities, such as academic freedom? (See our discussion of managerialism above.) In other words, might a shift in the balance of personnel at universities to a proportion weighted more in favor of administrators cause universities to become more managerial, even more bureaucratic and less pedagogical and educative?

So, colleges and universities have more administrators. At the same time, colleges and universities are hiring more lecturers and adjunct faculty (and fewer faculty on tenure lines, where job security would be relatively secure upon completion of an initial "probationary" period). Lecturers and adjunct faculty are paid less (this is attractive to college and university governing boards and state legislatures) and are less secure in their position (i.e., they are generally hired on a semester-to-semester and course-by-course basis, or sometimes these contracts are from year to year). The pay and the benefits are less for adjuncts and lecturers than for full-time, tenure-track faculty. Adjuncts and lecturers have fewer contracted hours, and the expectations are such that they devote little, if any, time to governance and the other maintenance functions performed by full-time faculty.

That said, the more insidious, seldom mentioned, perhaps unnoticed, trend in higher education—one that replicates processes already well-established in the US and Turkish public schools and at all levels (from aide to teacher to vice-principal, principal, and central office administrator)—is the increasing proportion of the faculties' time that is taken up by paperwork, meetings, and other tasks that are more administrative in nature. This is the tip of the iceberg in representing what is a fundamental role change for university faculty. Such a ballooning in the numbers of administrators at all levels of university systems brings with it an exponential explosion in the paperwork and administrative tasks that these administrators generate, all of which consume more and more of the faculty's time—time that could be devoted to academic pursuits, lesson preparation, and conferring with students one on one. In fact, under the current conditions imposed by a neoliberal agenda, students themselves are being forced to shoulder more and more of the financial burden of a college education (i.e., the states and the federal government are providing less) (Lewin, 2011), while getting less and less instruction and instructional time for their money (Zernike, 2009).

The hegemonic, insidious aspect of this colonization is that relatively few faculty are aware of the changing nature of their job to one that is more administrative, they have few tactics for resistance, they have been co-opted or seduced, or they see opposition as futile. Thus, and since the threat is nebulous, tactics for resistance and the possibilities for organizing in opposition are slim, if not nonexistent, owing, in the USA, to a conservative "right-to-work" policy environment in the southern states especially, anti-unionism, and a pervasive and deep anti-intellectualism that is part of the US collective psyche.[11] More and more, faculty come to accept these administrative tasks as being part of their job responsibilities, unquestioningly. As universities and colleges add administrators, the tendency is to become more bureaucratic, more hierarchical, not less. Increasing the number of administrators increases the work produced (where, however, the nature of the work produced by administrators tends to be administrative in nature—requirements for this and that, requisition forms and reports) the work load is devolved, but the power and authority remain concentrated at the top of the organizational pyramid.

Turkish Contexts of Corporativism

In Turkey, corruption is thought to have emerged during the Ottoman Empire in the sixteenth century. Society was experiencing decay and was collapsing under the weight of the administrative and financial systems of the time. Low-income civil servants fell upon economic hardship, which caused moral decadence, and as a result, bribery became a tradition from then on. According to a survey conducted by the Turkish Economic and Social Survey Foundation (TESEV), white-collar workers perceive bribery as the most important problem in Turkey (Adaman, Carkoglu, & Senatalar, 2001). Satisfaction with services and confidence in public institutions are low; what is worse, only 10 % of the people polled trust the political parties and national assembly in Ankara. The survey reflects the popular perception that corruption, bribery, and embezzlement in the social, political, and economic realms in Turkey are of major concern.

Another survey (Bayar, 2010) pointed out the perception that corruption increased when the introduction of neoliberal policies lowered barriers to investing in Turkey by big cartels. There was found to be a direct relation between corruption and the unemployment rate. Bribery, embezzlement, and organized crime appear to be on the rise, followed by what many believe to be a kleptocratic statist system.

The conditions that promote corruption in Turkey can be classified as managerial, economic, and social. Managerial reasons or conditions include bureaucratic structures and processes, rules and policies put in place for the running of the statist order, employment procedures and a lack of transparency and accountability for the state, and the lack of oversight of state practices and of the judicial system. These all contribute to widespread corruption in Turkey. In fact, rules and regulations in the business sector, including the application of tax law, share the characteristics that they appear to be arbitrary applications of the rules and restrictions governing trade, and this invites corruption (Hasdemir, 2006).

Bureaucracy, as an organizational form, was originally intended to thwart political corruption, cronyism, rent seeking, and bribery in developed countries (Weber, 1958); however, in Turkey, bureaucracy and politics are intertwined and politics has an undeniable impact on bureaucracy. The centralized, status quo structures of bureaucracy protect the state against citizens and does not give birth to decentralization, devolution of powers and civilianization concepts. Actually, social justice is a far way off in Turkey, in part because many bureaucrats obtain and retain their positions through political favoritism and cronyism and are protected by higher-level politicians. In these cases, government bureaucrats practice a particularly Turkish form of imperial hubris and, in the exercise of their authority, violate the “equal treatment of all” principle which is the essential component of public service. Moreover, the multiplicities and complexities of the rules in bureaucratic transactions invite corruption.

As regards the employment procedures of the state, high unemployment and/or underemployment in the public sector drives corruption in Turkey. A lack of a clear legal framework for the public financial management system hampers public transparency and accountability efforts, for example, through the use of the audit. Deficiencies in some of the basic principles and understandings of democratic governance—principles such as transparency in finance, accountability, performance management—lead to serious problems in Turkey. Often, efforts at management and control of public sector departments, institutions, and employees in Turkey leads to a kind of ritualism, and, paradoxically, this increases bureaucratic procedures and creates more red tape, rather than facilitating the management and supervision of the public administration (Türkiye Ekonomi Politikaları Araştırma Vakfı [TEPAV], 2005).

In addition to the political, policy, and structural conditions, economic factors also contribute to corruption in Turkey (and elsewhere). Some of these economic forces include the low-income levels of civil servants, the media and their relationships, the financing of politics and politicians, and the economic impacts of a high level of population growth. These socioeconomic conditions increase the pressure on the social and public services providers, which suffer from reduced resources and increased expectations. Under these conditions, significant opportunities for corruption arise in the distribution of public services. For instance, corruption is the product of the unequal and almost capricious distribution of employee wages and salaries in the public service sector, as there are no set criteria for determining the salaries and wages of workers. Furthermore, political parties and their candidates use the distribution of free goods and services to court votes, in violation of the law—a practice that is widespread. This leads to favoritism and corruption in relationships (TEPAV, 2005).

In terms of social reasons for corruption, the failures of the educational system, a diminishment of a sense of common responsibility, ineffective NGOs, and misplaced societal values are all factors (Hasdemir, 2006). Structures and processes for both non-formal and formal education in Turkey are hardly adequate. In addition, formal education, generally based on memorization, itself gives rise to corruption since it inhibits people's—students' and teachers'—initiative, creativity, autonomy, and free expression. Likewise, the citizens' and bureaucrats' perception of public service as watching over citizens in Turkey increases the likelihood of corruption and bribery. However, in developed countries, with their adoption of democracy and a large number of NGOs, the level of corruption is less than in other countries. In addition, in societies where sense of common responsibility is not developed, individualism is built naturally. In essence, the individual's struggle in Turkey is actually based on favoritism and friend relations (TEPAV, 2005).

Since the 1980s, Turkey has witnessed the emergence of a new economic system which parallels basic transformations in the global economy. Globalization creates an avalanche effect, giving the Turkish people the idea that it is a golden key that will open every door. Popular acceptance of this mythology changes Turkish economic, social, and political life. More importantly, it changes educational life. It implants the idea in the minds of the Turkish people that globalization creates knowledge-oriented people who can invent technologically hegemonic commodities to rule major markets and that the knowledge learned under conditions of globalization can be used in every aspect of life. However, there is another way in which globalization is viewed in Turkey. In this view, there is an antagonistic relationship between labor and capital, and neoliberalism is perceived as a phenomenon which serves capitalist countries' needs, that kills freedom, and that threatens the ethics and moral values at the roots of the nation.

Neoliberal policies after 1980 directly altered the Turkish economy and society by removing all the barriers to international capital and prospective investors. Changes based on neoliberalism have been painful and full of trouble because neoliberalism has been instituted at the cost of national unity, social equality in the sharing of the country's resources and revenues, and a widespread sense of social well-being. Privatization has taken hold and the government, which has been slowly removing itself from the provision of social services. The inscription of neoliberalism in Turkish politics, economics, and policy has ushered in more of a free-wheeling, anything goes environment. Planning is very important for a country's upcoming generations, but neoliberal approaches have narrowed or destroyed a national basis for social planning by the state. On the other hand, and to be fair, this move into a neoliberal policy environment has resulted in processes and procedures that have served to decrease banking fraud and corruption, and the anti-democratic demeanor of the previously existing statist institutions.

The Turkish educational system and the framing of the future training needs of the country have been severely affected by global capitalism and neoliberalist ideologies (Dikkaya & Özyakişir, 2006; Sayilan, 2011). There has been a sharp decline in state investment in the educational system of Turkey. Poor economic conditions and the unstable financial situation of many families have contributed to a worsening of the educational life of the country. Privatization processes and neoliberalist applications have opened the door for private schools, whose owners invest great amounts of financial resources in them, thereby creating cosmetically appealing schools and bringing with them vast inequalities of educational opportunity. As a result, children and young adults' levels of school enrollment rates have fallen considerably, and the quality of education has decreased overall. Insufficient resource distribution (monetary, material, and personnel) brings about unjust outcomes in schools and differences of socioeconomic status (SES) add to the existing injustices in schools. Those schools which capture an advantage in financial and material resources contribute to a decrease in educational quality for students studying at those schools serving a lower SES population. It is evident that there are numerous injustices against students in lower socioeconomic levels.

Another aspect of these selfsame neoliberalist and corporativist policies is that there are an insufficient number of teachers willing to serve in the lower SES schools (a socioeconomic professional trend with parallels in the USA). This shortfall is compensated for by employing teachers on a strictly contractual basis or by hiring teachers by the hour. This decreases the educational opportunities offered these students too (Polat, 2007). There is no basic right to educational equal opportunity in Turkey. This lack results in various injustices being perpetrated by the Turkish educational system and at all levels—from preschool through doctoral study in nearly every school and university. Educational provision in Turkey varies along gender lines, geographical region (east v. west), and according to socioeconomic status (Tanman, 2008).

US Contexts of Corporativism

In the USA, practices similar to those in Turkey are seen in the educational system, and on a daily basis. Some occur at the local level, where parents, teachers, business, and community leaders may perpetuate injustice, though many injustices are fostered at the policy level. We home in on this level in our discussion of how capitalism, corruption, and corporativism plague our educational system and educational provision.

The enactment of the US federal legislation known as No Child Left Behind (NCLB) (2001) was meant to ensure that all students received a quality instructional program. This act required states to develop assessments in basic skills for students at certain grade levels. It called for highly qualified teachers in every classroom for states, districts, and schools to be able to qualify for federal funds. (In Texas, to be deemed a highly qualified teacher, individuals were required to pass a content-level test and a pedagogical exam.) This federal initiative did not assert national achievement standards; on the contrary, it allowed the policy makers in each state to determine the levels of growth each child was expected to achieve. It gave states the freedom to determine how they were going to measure this. Texas developed the Texas Assessment of Knowledge and Skills (TAKS) to assess students and set the Texas Essential Knowledge and Skills (TEKS) as the official curriculum. We are still suffering from the unintended consequences of this initiative.

After the initial administration of the TAKS test, school leaders, specifically principals, began questioning the accountability movement: They claimed that the curriculum was too broad to teach. Multinational publishing companies began producing textbooks to address the Texas curricula. These same publishing conglomerates published the tests and, in a vicious circle, published the textbooks and other instructional material to remediate the "failings" unearthed by the tests. At that time, and in order for textbooks to be adopted for use throughout the state, publishers needed to specify what specific TEKS objectives were being addressed in their textbooks and their lessons. A fractious state school board made the textbook adoption decisions for the entire state, approving several textbooks by various publishers for the state-approved list. The highly politicized textbook selection process (a de facto curriculum) was/is all the more so because, being such a huge market, Texas drives textbook development decisions that have an impact on other parts of the nation. The science textbook selection process was highjacked by conservative Christian blocs and resulted in the introduction of so-called intelligent design (a modified Christian cosmology) into the resultant textbooks developed for Texas public schools. Additionally, state-wide science curricula were altered, and Texas teachers are required by the force of law to teach the state curricula, so that the theory of evolution, when taught, was to be taught as "just a theory," and it had to be taught alongside "intelligent design." The social studies textbook selection was no less contentious.

This last legislative session saw a loosening of the process, one right out of the neoliberal playbook, whereby a fundamental change was implemented, from adoption to allotment. Now, and concurrent with a severe slashing of the state education budget, there is no state-approved list; school districts are allotted a certain amount of money on a per student basis that they may spend for textbooks and/or other instructional resources. Many districts are choosing to spend their "textbook" allotment on computers and other technology (such as tablets) or on teacher professional development. Educational supply companies, vendors, and computer salesmen

(/women) are having a field day, with a lot of profit to be had and precious few guidelines, safeguards or oversight to be found. The excesses and abuses of a neoliberal economic policy infused into school finance are everywhere evident, and the controversy has been devolved from the state to the district level.

As a result of the draconian nature of the Texas accountability regime, more teachers teach to the test and the curriculum has become severely narrowed (Cambron-McCabe, 2010; McNeil & Alenzuela, 1998). Because funding is tied to accountability, this contributes to, if not drives, an obsession with testing and gaming the system to appear successful (Waite et al., 2001). These top-down reforms have contributed to his problematic situation. Challenging the policy-setting structures and processes at the top may be necessary to promote more socially just learning environments (Dantley & Tillman, 2010; Theoharis, 2009).

Conclusion

Social justice and social injustice look remarkably similar in Turkey and the USA, though differences surely exist. We have attempted to show how globalization and neoliberalism are behind many of the injustices perpetrated upon our nations' school children. When corporativism and corruption enter national, regional, state, or district policies and processes, it is not just the children who suffer, we all do. Profit-taking, opening public coffers to private for-profit capitalist concerns—even when they are nominally conceived of as schools, and making decisions based on a short-sighted neoliberal conception of "efficiency" rob us all. Privatization is but one of the contributing factors, but it alone is of insufficient weight to do much damage. In order for injustice to drag down untold individual school children or the teachers who would teach them, privatization must ally itself with other socioeconomic forces.

As such, neoliberalism spearheaded a global ontological shift to what we have described here as corporativism. Superintendents of schools eschew that title in favor of that of CEO. Budgetary decisions are based on a narrow conception of efficiency. Teachers are evaluated or assessed on their effectiveness or efficiency. Federal education initiatives (in the USA, its Race to the Top) strong-arm states into allowing more for-profit charter schools to operate in their states in order to qualify for the maximum amount of federal funding. School districts in the USA make a devil's bargain with on-line educational providers to split the monies allocated to the districts on a per pupil basis.[12]

Our fear is that we have gone too far down this corporativist path to turn aside or staunch this bastardization of our public education system. We need more conscientious citizens to speak out against the gutting of public education, whether done in the name of efficiency, or raising standards, or adopting and incorporating new and emerging technologies.

We have tried to do our part here: to raise the alarm and to try and provide the language and concepts with which to problematize what is happening. We can do more. We all can do more. It is perhaps not too alarmist to say that the future hangs in the balance. Conscientious educators around the world must act if we are to win the future. No less is at stake.

Notes

1. We assert that both of these social phenomena—corruption and corporativism—contribute to grossly unequal, unjust societies. Both operate through and reproduce a type of pyramid scheme (see Waite & Allen, 2003, on the pyramidal nature of corrupt systems). Both processes operate within, take advantage of, and reinforce extremely hierarchical systems, and such rigid hierarchical systems perpetrate undue stress and other maladies upon those, the vast majority, who populate the lower rungs of society, the bottom portions of these pyramids (Waite, 2010; Wilkinson, 2005; Wilkinson & Pickett, 2009).
2. The comparison holds in most cases; there are, however, a few anomalies. The wealth to corruption comparison can be had by comparing Transparency International's corruption perception index (http://www.transparency.org/policy_research/surveys_indices/cpi/2010/results) with global GDP data by country. We used the CIA data from the CIA World Factbook (http://www.econguru.com/heat-map-of-worldwide-gdp-ppp-per-capita-2008/).

   The most glaring anomalies or outliers are the USA and certain Arab countries, notably Saudi Arabia, Kuwait, Qatar, United Arab Emirates, and Oman. The Arab countries, while awash in petrodollars (and hence with a better than average standard of living), fall midrange on the corruption perception index. The USA, on the other hand, is rated relatively favorably on the corruption perception index but manifests extremely high-income gaps between the wealthiest 20 % and the poorest 20 % (Wilkinson & Pickett, 2009, p. 17).

   It seems to us that the tremendous amount of wealth in the Arabian countries ameliorates the effects of corruption, while, in the USA, the tremendous wealth disparity is a result not of corruption, but of corporatism (or corporativism, if you prefer), which, in line with our argument, is not perceived as corruption per se.
3. Alongside the more formal organizations—those at the core of what we here term social institutional forces—there are those forms of human association that are more informal, and perhaps all the more important due to their informality. Here we are thinking of NGOs, loosely connected social and political groups (like "flash mobs" and, recently in Germany, "enraged citizen" groups [Dempsey, 2011]).
4. Welch's (Rushe, 2002) retirement package alone, according to papers filed in his divorce, included:

   > unfettered use of corporate jets (a perk valued by an expert as being worth $291,677 a month). He also had a company-owned apartment overlooking Central Park, a limousine, a cook, free flowers, country-club memberships and a charge account at Jean Georges restaurant. He was also entitled [sic] to top tickets at the Metropolitan Opera,

> tennis tournaments such as Wimbledon, and for games played by the Knicks, Yankees and Boston Red Sox. The affidavit revealed that he didn't even pay for his laundry. (Rushe, para 16)

5. The relative compensation of the league commissioner varies by league (http://sportsbiz.biz/2010/09/13/sports-commissioner-salaries-the-top-five/), but all have extremely attractive pay packages. For example, the Major League Baseball commissioner, Bud Selig, was paid $18.35 million in 2007. Only ten players earned more that year.

   A recent story in *Golf Digest* stated: "With a pay package of $5.1 million in 2009, PGA [Professional Golf Association] Tour Commissioner Tim Finchem leads our list of the highest-paid golf-association executives. The PGA Tour, a tax-exempt organization [!], reported revenue of $954.5 million in 2009 …. Finchem's compensation would've ranked fourth on the PGA Tour's 2009 money list but is below that of MLB Commissioner Bud Selig ($18.3 million), the NFL's Roger Goodell ($10.9 million), the NBA's David Stern ($10 million) and the NHL's Gary Bettman ($7.2 million)" (*Golf Digest*, 2011, p. 44).

   For further statistical comparisons, see also: http://www.pensionplanpuppets.com/2010/7/12/1565848/commissioner-bettman-overpaid-an

6. We are working with the commonalities among organizations and institutions while acknowledging differences or variations. We strive to practice reflection and self-criticism and, in doing so, take note of some different ways of classifying phenomena of interest. Different analytical frames are simply that—heuristic devices that approximate but do not substitute for the phenomena of study. One such heuristic device, one we employ here, is the taxonomy—classifying, grouping phenomena, and organizing them along hierarchical lines. The tendency to employ this heuristic device may have led Fukuyama (1999) to assert that hierarchical organization is human nature, though we believe there is more to it than that.

   There are different forms of organization, other than the hierarchical bureaucracy, as Giddens (1991), Shirky (2008), and Wilkinson (2001) remind us, some having evolved, especially recently, out of the new media—Facebook, Twitter, Flickr, and others.

7. We wish to make clear our conviction that the corporation as an organizational and organizing form was not inevitable or preordained in some sort of twisted social Darwinian sense; anyway Stephen Jay Gould's (1992, 1996) body of work was nothing if not a corrective to the misapplication of evolution and Darwinism—the mistake being teleological, that is, that the resultant or current state was derived, if not purposefully, then by something akin to divine intervention.

8. Note the current difficulties Rupert Murdoch's media empire is undergoing, due, in part to a tarnished reputation resulting from unethical and, likely, illegal aggressive investigative practices, resulting in, so far, the closure of a 168-year-old newspaper, *The News of the World* (Lyall, 2011). In essence, the decision to shutter the paper at the center of the controversy was strategic: it was done in hopes of yet salvaging a larger deal by News Corp to acquire British television rights.

9. However, as we are in the early stages of this research project, we fully expect that the list of characteristics will be filled out and more comprehensive in the future.
10. Which it certainly did in the immediate aftermath of this massacre. The Blackwater employees were extracted from Iraq, and only recently has there been even any hint that a few of these mercenaries may face possible future charges, but for making false statements during the initial investigation.
11. Another dynamic impeding an organized resistance by university faculty to the threat posed by the spread and inculcation of, first, neoliberalism, and then parasitical upon that, corporativism, is the nature of the profession itself and the nature of the professional attracted, to (and developed through) this type of work. It is an inside joke among university faculty and administrators that managing faculty is like herding cats, it can't be done. This presents still another impediment to organizing US faculty, at least, to resist corporativist hegemonic practices and ways of thinking.
12. The costs to the district are nil, and they keep half of the state monies allocated, with the other half going to the Web-based content provider.

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Chapter 34

The Courageous Conversations Project: Interrogating Perspectives and Perceptions of Race, Poverty, and Schooling in South Africa and the United States

Arnold Dodge and Berte van Wyk

> Creating freedom, community and viable relationships has its price. It costs time and courage to learn how to sit in the fire of diversity. It means staying centered in the heat of trouble. It demands that we learn about small and large organizations, open city forums and tense street scenes. If you step into leadership or facilitatorship without this learning, you may spend your time recapitulating the blunders of history. ~ Arnold Mindell

Background/Rationale

We (the authors) met in 2009 during a People to People exchange event at Stellenbosch University near Cape Town, South Africa. Since that meeting, we have been collaborating on the Courageous Conversations Project. Visiting each other's countries annually, touring schools and communities, and participating in university colloquies have raised our awareness of our own and other perspectives and perceptions of the relationships among race, poverty, and schooling. We have met collectively and individually with university faculty, school administrators, and regional directors to review the project and ask for guidance for both the purpose and details of the initiative.

Illustrative of the very personal nature of the work, the US author describes his experience upon visiting the Hector Pieterson museum in Soweto, a museum dedicated to the Soweto uprising in 1976 in which soldiers from the apartheid government fired upon students who were protesting the mandate that Afrikaans and English be the only acceptable mediums of expression in their schools:

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> I was touring the museum hallways with a delegation of black and white educators from the US, looking at the heartbreaking photographs of soldiers confronting school-age students; especially upsetting was the iconic photo of Hector Pieterson, in the arms of a fellow student, after having been shot and killed by the police. While I was disturbed by what I saw, I was composed and cerebral. I noticed that many of the black people who were touring with me were crying. It was then that I realized that the lived experience of being black was something that I could appreciate but never fully understand. My consciousness is a white consciousness, freighted with historical privileges and protections, and as much as I regard myself as a politically progressive and sensitive individual, I will always be on the outside of the black experience looking in.

The project is driven by what we perceive as social injustice on a systemic and massive scale throughout the educational systems in both countries, an injustice propelled by structural, not overt, racism (Wells, 2010). Rather than building on cultural differences to strengthen our educational offerings, we agree with Moll's assessment regarding how far we have come since the landmark cases in the USA involving school segregation: "… current educational remedies, featuring regimes of standardization and testing to control schools, seem stagnant if not anachronistic, failing, as they do, to mobilize the social, cultural, and linguistic processes of diverse communities as the most important resources for positive educational change. And, in this failure, they also delay for all of us the fulfillment of the promise of *Mendez* and *Brown*" (Moll, 2010, p. 451). Add "… and the promise of the end of apartheid" and Moll's opinion has a two-country relevance.

Within this chapter, we describe a template for action that we believe is replicable in any investigation of the influences of race and poverty on educational opportunity. Our belief is that the first step in any such investigation is the ability to confront social injustice head on, eschewing bromides and polite fiction that so often characterize discussions of race and poverty. We are ever-mindful of these "economies of niceness … ways in which … being nice [is used as a] currency … traded openly as a place-holding discourse to take the place of more critical work" (Galman, Pica-Smith, & Rosenberger, 2010, p. 233).

The project is situated within the framework of critical race theory and is propelled by a vision to challenge the dominant discourse in each country – a discourse that attempts to normalize "whiteness." This phenomenon is animated in fictionalized parables created by critical race legal scholar, Derrick Bell. One parable's lesson is that in schools created for white children, African American culture and language are misunderstood and pathologized as deficient and African American student behavior is framed as oppositional (Taylor, 2007). Despite the daunting task of confronting this dominant discourse, the authors are committed to moving in a positive direction, fueled by the courage of the participants to be actors in uncharted territory. A not surprising (but nevertheless unsatisfying) finding thus far is that we have uncovered more questions than answers.

A tour of a New York suburb by the South African author provides a window into the growing awareness that both authors are experiencing as they work together. He finds a sobering similarity apparent in the social landscapes of both countries:

> As the car drove through an impoverished neighborhood, a community with apartments over storefronts, run-down buildings and black people walking up and down the streets, I was not surprised, knowing that there were many such communities in the US. What was surprising was that within less than a hundred meters the boulevard changed into a leafy and inviting street of wealthy homes with manicured lawns which I was told was an exclusively white enclave. I had to stop and take a photo up and down both ends of the street. The proximity of the disparity was breathtaking, reminiscent of my homeland where poor black townships are within walking distance of magnificent homes, gated, secure and filled with white people. I recalled one of the South African principals in our project discussing proximity and school resource disparity: 'It creates problems when we have a school that offers a wide range of activities, opportunities and outstanding results, while on the doorstep of the same community we have a school that has limited resources, poor results and offers learners no hope.' My American friends seem to be living with the same challenge.

The nature and purpose of the work of the Courageous Conversations Project is manifold:

- To promote honest dialogue and reflection about issues of race and poverty in South African and US schools
- To examine forces of resistance to providing equitable resources and instruction for all students regardless of race or social circumstances
- To examine the historical roots of race and poverty in both countries and the (often subtle but powerful) impact the historical narratives have on the children of both countries
- To examine the current sociocultural influences on race and poverty in schools
- To learn cross-culturally about workable strategies for achieving social justice

While our work is informed by the scholarship of those who have examined issues of race, poverty, and schooling, our approach to the project is spare, direct, and unadorned. A few simple elements comprise the model:

- Situating the project in a historical context
- Becoming aware of some of the "drivers" of social injustice related to schooling in both countries
- Enlisting the support of school leaders who come from a variety of settings
- Creating opportunities for conversation, using protocols that stimulate open and honest deliberation and/or dialogue

With these elements in place, we hope to create uncomfortable, unprecedented, cross-national, nondefensive, vulnerability-inducing conversations (i.e., courageous conversations) about how race and poverty affect educational outcomes for children. By creating dissonance, we hope to stimulate a passion for solving problems that to date have remained intractable. Davidoff's warning about the current paradigm of school leadership in South Africa seems most fitting:

> … the most important dimensions of leadership … have to do with vision, passion, love, imagination, and a burning sense of commitment to the social and human dimension of education – and the importance of leadership in this context… current approaches tend to focus more on skills development and conceptual understandings of specific paradigms, rather than providing opportunities for people in leadership positions to be inspired to

> inspire – for they themselves to undergo profound paradigm shifts through experiencing what it really means to lead into the future. Without such passion, very little is likely to change, and the old divisions which characterised education – and life more generally – in South Africa, are likely to remain. What we are looking for are ways of breaking the chains of the past, which find their way into the present, and are often – unwittingly – created and maintained internally. (Davidoff, 2010, p. 10)

A few caveats about the project are in order. First, while there has been much written regarding the differences in the scourges known as racism and poverty, for purposes of the Courageous Conversations Project, we have chosen to link the two concepts. Indeed, in both South Africa and the United States, those traditionally thought of as the underserved (blacks and coloreds in South Africa and blacks and Latinos in the USA) are also those who often suffer from the burden of poverty. Second, our investigation refers to authors on both sides of the Atlantic. While individual researchers and scholars who have investigated issues of race and poverty have mainly worked within their own countries' contexts, the truths they unearth are applicable for the most part to both South African and US circumstances. Finally, the project is in its initial stages. We make no warrant regarding conclusive findings. We do, however, offer the ideas in this chapter as a draft plan of action, one that can be modified, recontextualized, or borrowed from at will for those seeking to enter the breach.

Historical Narratives

Issues of race, poverty, and injustice are woven into the historical narratives of South Africa and the United States. Hundreds of years of social oppression and tumultuous upheavals in both countries – enslaving and colonizing minorities, civil wars, and power struggles between the powerful and the more powerful – bring us to the modern era where we glimpse as first hand witnesses the continuation of racial and social strife.

In 1946, Alan Paton wrote *Cry*, *the Beloved Country* (Paton, 1948/2003) as both a cry against injustice and a yearning for justice in his beloved South Africa (Callan, 1991). Two years later, the imprimatur of apartheid became law of the land, a law which relegated 90 % of the population to second class citizenship, gave rise to a social revolution, and left the country today, as some see it, "… divided as before … racism … rife at an individual level and heavily entrenched in democratic South Africa on an institutional level" (Naidu, 2003).

A few years earlier, across an ocean, Richard Wright, in *Native Son* (Wright, 1940), wrote of the harrowing experiences of a young black man caught in the grip of racial forces he could not understand. It was 1940, 14 years before Brown v. Board of Education would mark the end of de jure school segregation in the United States, and a generation before the progress of the civil rights movement. Today, widespread de facto segregation stands as the greatest engine of disparity in American public life. Attitudes regarding race have shown little change even after the election of the first black US president, a national survey reporting that "stark racial divides" remain (Winslow, 2010).

Table 34.1 Movements and legal milestones related to race issues in the United States and South Africa

Era	United States	South Africa
Separate but equal	Plessy v. Ferguson	The Bantu Act
Desegregation	Brown v. Board of Education	End of apartheid rule
Redressing inequality	Affirmative action	The Redress Acts
Challenging redress	Bakke decision	Support of "nonracialism"

Note: While both countries have been visited by various movements, the makeup of the populations should be taken into account in any discussion of race and the body politic. In South Africa, 90 % of the country is African or colored and in the USA, while there is a growing black and Hispanic community, the majority (63.7 %) in 2010 was non-Hispanic white

The US and South African societies have undergone parallel scenarios in their respective responses to racism (see Table 34.1). "We can make separate more equal," the call of those who do not want social change (Wells, 2010), began with Plessy v. Ferguson, which officially sanctioned separate but equal in the USA. A US principal involved in the project discusses why separate but equal remains an intractable paradigm in the public consciousness, even for those who would ostensibly gain from integrating schools:

> One option [to address school inequities] would be that wealthier communities could consolidate with poorer communities for purposes of schooling. However, there would be a firestorm of reaction from both communities. A lot of the black communities would be upset because of what they would see as patronage. They say: 'Just give us the resources and we will do fine.' It is unfortunate that consolidation would be so difficult to achieve because both the white students and black students would benefit. It debunks mythology about each community if kids go to school with one another.

In South Africa, the notorious Bantu Act sought the same remedy for social inequity, notwithstanding Alexander's reminder that " … no social system based on the separation of people into 'groups' could result in an equal or just sharing of that society's opportunities and resources" (Alexander, 2004, p. 6). Affirmative action was the US attempt at a course correction after nondiscrimination laws were passed; the Redress Acts in South Africa were similarly situated to make right the injustices of the apartheid era. But just as the Bakke case challenged affirmative action in the USA, there are those in South Africa who have challenged the continuation of categorizing social action by race, seeing it as a betrayal of the ideals of nonracialism (Dugger, 2010).

The Narrative Today

One easily senses the historical DNA of racism and division from both countries in today's narrative as the US author discovered about South Africa during his first visit:

> When I first arrived in South Africa I naively expected black and white folks to be in harmony with the wealth distribution being relatively evenly divided. How surprised I was to find the extremes. And how naïve I was to believe that after 16 years of democratic rule, things would be so very different. Coming from a land in which slavery was abolished

> 150 years ago and school segregation abolished 60 years ago I shouldn't have been surprised. I was reminded of what Titus had to say in his caution to South Africans regarding relying too heavily on a de jure solution to social problems: 'To start with the illusion that the U.S. Supreme Court could fundamentally alter the U.S. school system because of an ikon [sic] called the Bill of Rights, is to end up with a delusion that it can eliminate the vested economic, political and social inequalities in American society generally.' (Titus, 1974, p. 7)

In South Africa, many believe the single most important issue facing the nation since the 1994 abolition of apartheid is breaking the grip of poverty on a substantial portion of the citizenry. Most economic and policy analysts agree that approximately 40 % of South Africans live in poverty, with the poorest 15 % in a desperate struggle to survive (van Wyk, 2010a). The story line of poverty easily bleeds into the schooling narrative. Graeme Bloch, an education researcher at the Development Bank of Southern Africa, remarks: "If you are in a township school, you don't have much chance. That's the hidden curriculum – that inequality continues, that white kids do reasonably and black kids don't really stand a chance unless they can get into a formerly white school or the small number of black schools that work" (Bloch, as cited in Dugger, 2009). This inequality is staggering when one looks at the statistics associated with black and white student achievement in South Africa. As an example, "… in the Western Cape, only 2 out of 1,000 sixth graders in predominantly black schools passed a mathematics test at grade level in 2005, compared with almost 2 out of 3 children in schools once reserved for whites that are now integrated, but generally in more affluent neighborhoods" (Dugger, 2009).

It is clear that after 17 years of democracy in South Africa, "matric results" (similar to graduation rates in the USA) remain a stark reflection of the racial history of the country. The 2009 results clearly indicate that pupils attending former Model C, former House of Representatives (HoR), and former House of Delegates (HoD) schools stood a much better chance of passing matric exams than those in other schools (Roodt, 2010). Roodt suggests that this can be attributed to the fact that former Model C, HoR, and HoD were better resourced under apartheid, and still generally benefit from superior facilities, and other factors, including the greater independence arising from their semiprivate status, and greater parental involvement. Of the 466, 474 African pupils who wrote the 2009 matric examination, more than 90 % did so in schools other than Model C, HoR, and HoD schools. This indicates that a pupil's odds of passing matric are significantly affected by what type of school he or she attends.

The USA has a similar story to tell regarding wealth and schooling today. The wealthiest 1 % of Americans possesses a greater collective net worth than the bottom 90 % (Kristoff, 2011). The percentage of Americans living in poverty in the USA recently hit one in seven, or 44 million, a 15-year high. Long Island, the location of the US site for the current project, is home to the 32 richest zip codes in the United States according to the Forbes List of America's Most Expensive ZIP codes (Endo, 2010). And as witnessed by the South African author, Long Island is also home to poverty-stricken communities, some neighboring extraordinarily wealthy communities. The contrasts on every social indicator between these worlds apart have been labeled by some, the "shame of the suburbs" (The Shame of the Suburbs, 2004). A look at the school profiles indicates the relationship between wealth and school success.

On Long Island, only 9 % of the black students and 14 % of the Hispanic students were enrolled in the top 25 % of Long Island's best schools in 2008–2009, according to the US Dept. of Education. In 2009, one struggling district with a large minority population had a 4-year graduation rate of 50 % while the white majority community next door had a rate of 96 %. (In the adjacent county, a similar statistic is found between neighboring districts – 52 % graduation rate in the minority community and 95 % in the white community.) In the school districts in which 90 % or more of the students are black or Hispanic, on average, only 2 % of their students score at the highest level of the state's eighth grade English language arts exam and 8 % on the math exam. By contrast, on average, 17 % of the students in districts that are 90 % or more white or Asian score at the highest ELA level and 36 % at the highest math exam level (Gross, 2011).

The Drivers

What fuels the continuation of social injustice currently existing in the school systems of South Africa and the United States? Notably, Moll (2010) reminds us that all educational decisions involve relations of power and treatment of differences and have consequences for equity and social justice. Therefore, we ask, "What are the drivers that give force and energy to the structural racism and socioeconomic divide that continue to make schooling experiences so uneven for the children of both countries?" We offer three such drivers which may shed light on this phenomenon.

Zero Sum/No Room at the Top

First, race and poverty appear to be particularly problematic when there is a perception of scarcity of resources. Conversely, in a "non-zero-sum mobility" environment, i.e., one in which there is a perception that there is enough for all (Alba, 2009), there may be less likelihood of racial and social tensions to emerge. To what extent do policy makers, educators, parents, and students believe that a "zero sum" exists in providing school resources? And if there is the belief that there is just so much to go around, how does this affect attitudes when decisions have to be made about schooling? Some strikingly familiar themes emerge in Paton's tale of the South African racial and wealth divide. Here, he weighs in on the zero sum phenomenon:

> Some say that the earth has bounty for all, and that more for one does not mean less for another, that the advance of one does not mean the decline of another. They say that

> poor-paid labour means a poor nation, and that better-paid labour means greater markets and greater scope for industry and manufacture. And others say that this is a danger, for better-paid labour will not only buy more but will also read more, think more, ask more, and will not be content to be forever voiceless and inferior. (Paton, 1948/2003, p. 110)

Is it possible that there is a basic mistrust of the powerless because they may become powerful, thereby threatening the elites who run each country? This appears to be a disturbing but plausible notion. "Societies inescapably generate elites. Those elites can be public-spirited and responsible or they can be selfish and shortsighted. An elite can have concern and care for the less advantaged or it can callously disregard them" (Frum, 2011). Or, the elites can (either consciously or unconsciously) develop a plan which purports to help the disadvantaged, but by its very structure keeps the disadvantaged in their place. The strategy is borne of a fear of zero sum room at the top. Okun (2010) uses a simple trope to demonstrate this phenomenon: "An analogy would be the ladder – its highest point represents our deepest aspiration while by its very nature accommodating only a limited number. Western culture posits this ladder as a big 'T' truth, human nature, an immutable reality, when it is, in fact, simply a single and very specific construct …" (p. 7). In another words, if the elites allow everyone an entrée to the upper echelons of society, then there will simply be less room for the current occupants. We submit that one such strategy in the USA is seen in the energy and drive that powerful and rich people have to close the "achievement gap."

For years, the American public has been bombarded with the news that there exists an achievement gap between white children of privilege and children of color who are poor. Federal and state initiatives abound to address this inequity. Is it possible that some believe that there is room at the top for only a limited number and that by continuing to rank schools and students, we keep the air at the top rarefied for the privileged few? The lurching towards greater accountability may actually be driving the disparity (Wells, 2010). What some see as a well-meaning attempt to offer additional resources – and certainly additional attention – to needy children, others see as a subterfuge with a devious end in mind:

> While the invocation of the achievement gap into the national and intellectual mainstreams began as way to name the nation's failure to educate all youth equally, it soon devolved into a mechanism for normalizing Whiteness and further obscuring past and current histories of racial oppression. Instruments (or, perhaps more accurately, social weaponry) such as aptitude and achievement tests provided (and continue to provide) the blunt force for this invasive effort, both visibly and rationally upholding white-superiority ideology over all student populations regardless of race … the constant and continuous comparison of students of color (African and otherwise) to white students as buffered by test scores reinforces those differences in the extreme … A kind of white superiority- having been firmly established in the discourse of achievement- angles performance squarely in the direction of Whiteness, which occupies a central space in the performance paradigm, a space against which all other things, people, and places are measured … our continuing search for strategies to inspire the performances of youth of color in this country requires renewed commitment, particularly in relation to our much longer quest to redress historical inequities in education. But evoking the achievement gap discourse as matter of fact doesn't get us closer to our goals. In fact, it moves us farther away because the construct of the achievement gap digs deep into those psychoexistential wounds-the same wounds that first severed the nation. (Kirkland, 2010)

The Convenient Lie

> It's … hard to ignore the reality that poverty is an immutable obstacle in the path of improving public education, one that simply can't be swept aside by the rhetoric of raised expectations. (Mahler, 2011)

The second driver to consider is the "convenient lie" factor (Dodge, 2009). Much as there are inconvenient truths that many of us wish would go away, so there are convenient lies that we are willing to accept as facts. One such lie: If only the schools were doing a better job, then the ills of society would be cured. In a now famous statement, US President George Bush, during his campaign for the presidency, claimed that those who thought that schools in poverty-stricken areas could not succeed were practicing "the soft bigotry of low expectations" (Bush, 2000). That clarion call unleashed an army of crusaders who promote the canard that poverty is not the problem.

The truth is that good teachers and administrators are no match for "harsh social policies and the pernicious effects of poverty" (Berliner, 2009). Lack of fundamental community health and infrastructure needs, e.g., permanent roads, piped water and sewage, and electricity (Mbunyuza de HeerMenlah, 2010), are not rendered harmless to a child's welfare by a good school. Such is the stuff of magical thinking, which provides convenient cover for those who wish the social order to remain the same.

Advocates of the good-schools-are-possible-in-spite-of-poverty mantra often point to "high-flying schools" that achieve high test scores despite serving disadvantaged populations. The fact is that the likelihood of becoming a "high-flying school" in spite of poverty should give any thoughtful and honest individual pause: Of 60,000 schools considered, low-poverty schools are 22 times more likely to reach consistently high academic achievement compared with high-poverty schools. Schools serving student populations that are both low poverty and low minority are 89 times more likely to be consistently high performing compared with high-poverty high-minority schools (Harris, 2007).

Not only is poverty self-evidently destructive to a child's well-being, but it produces a host of metastasizing branches that impede educational progress:

- The Century Foundation in "Turnaround Schools That Work: Moving Beyond Separate but Equal" (Kahlenberg, 2009) suggests that the current trend in the USA for turning around schools ignores important factors, including the students and parents in high-poverty and low-poverty schools. Dramatic differences exist in behavior, mobility, peer vocabulary, and parental involvement (in PTA membership and volunteering) between high-poverty and low-poverty schools.
- It is estimated that by the time a child is age 4, children of professional parents have heard on average 48 million words addressed to them while children in poor welfare families have heard only 13 million (Hart & Risley, 1995).
- Students are subject to conditions in poor communities which can have dramatic effects on their ability to perform in school: low birth weight; alcohol and cigarette use, diabetes, and influenza during pregnancy; inadequate dental and vision

care; difficulty providing enough food and therefore inadequate nutrition; the effects of pollution (e.g., high levels of mercury and lead, and PCBs, air pollution inducing asthma); family violence and stress, and neighborhood violence; and transient attendance because of frequent moves (Berliner, 2009).

As Richard Rothstein (2008) opines: “There’s a lack of moral, political, and intellectual integrity in this suppression of awareness of how social and economic disadvantage lowers achievement. Our first obligation should be to analyze social problems accurately; only then can we design effective solutions” (p. 10).

The Gini Index

The third driver, which actually sets the stage for the first two, has to do with the Gini index results. The Gini index, a gauge of the disparity in wealth distribution between the top 10 % and the bottom 10 % of a country, finds that South Africa is #10 and the USA is #56 (in a recent iteration of the index involving 130 countries) in terms of greatest disparity, with the number one position reflecting the country with the greatest disparity. This, in effect, means that both countries, from a global perspective, have huge gulfs between those who have economic resources and those who do not. At the deepest level, this disparity forces those who believe in justice to confront their histories, their policies, and the lack of progress towards equity. Table 34.2 shows the positions of South Africa and the USA – and the company they keep. And, for another point of reference, the countries with the least disparity are also shown.

The impact of the uneven distribution of wealth on life chances should not be underestimated:

- Children who experience even a bout of poverty are less likely to graduate from high school, are more likely to become very young parents, have more difficulties learning, and earn less money than their nonpoor peers as adults. “Child poverty is in some ways a leading indicator of how the country is going to be doing down the road … Nearly all of the social problems that we worry about in this country are heavily correlated with child poverty” (McCarthy, 2011).
- Inequality within rich countries breeds a host of health and social problems, including lower life expectancy, higher rates of infant mortality, shorter height, poor self-reported health, low birth weight, AIDS and depression, mental illness, decreased level of trust, obesity, teenage births, homicides, imprisonment rates, and social mobility problems (Wilkinson & Pickett, 2011).
- “… the disparity between the haves and have nots was often as simple as black and white. Despite the end of apartheid in 1994 the bulk of the diamond mines, farmland and other natural resources remain under the control of the white minority Afrikaners …. Whites make up about 12 % of South Africa’s 50 million people, yet they still hold down about 80 % of all professional jobs. White unemployment is around 5 %; black unemployment, 27 %” (Khan, 2010).

Table 34.2 Gini index of selected countries' wealth disparity – lower numbers signify greater disparity

#1 Namibia
#2 Lesotho
#3 Sierra Leone
#4 Central African Republic
#5 Botswana
#6 Bolivia
#7 Haiti
#8 Colombia
#9 Paraguay
#10 South Africa
#11 Brazil
#12 Panama
#13 Guatemala
#14 Chile
#15 Honduras
#16 Peru
#17 Dominican Republic
#18 Argentina
#19 Papua New Guinea
#47 Nicaragua
#48 Iran
#49 Saint Lucia
#50 Kenya
#51 Singapore
#52 Burundi
#53 Thailand
#54 Cambodia
#55 Senegal
#56 United States
#57 Ghana
#58 Turkmenistan
#59 Georgia
#60 Sri Lanka
#61 Mali
#62 Russia
#63 Tunisia
#64 Burkina Faso
#65 Morocco
#121 Ukraine
#122 Finland
#123 Hungary
#124 Bosnia and Herzegovina
#125 Slovakia
#126 Norway
#127 Czech Republic
#128 Sweden
#129 Japan
#130 Denmark

Retrieved from http://www.nationmaster.com/graph/eco_gin_ind-economy-gini-index on September 23, 2011

- How many children and parents in impoverished communities can describe their school as this US principal from a wealthy community describes his? "Stable tax bases, continuity of leadership, better retention rate of faculty and staff, better pay, access to technology, appropriate and well-maintained facilities, lower class size, a full array of guidance and special education services, home life which is immersed in culture and literature, two parent families, (you can always reach a parent), home violence and neighborhood violence virtually non-existent. These are the resources of a wealthy district."
- The Pew Research Center study shows that in the USA, the wealth gaps rise to record highs among whites, blacks, and Hispanics (see Table 34.3). These findings are based on the Pew Research Center's analysis of data from the Survey of Income and Program Participation (SIPP), an economic questionnaire distributed periodically to tens of thousands of households by the US Census Bureau. It is considered the most comprehensive source of data about household wealth in the United States by race and ethnicity. This metric of disparity is truly breathtaking.

Part of the work of this project is to interrogate all facets of race and poverty consciousness that shape decision making in the past and now. There have been painful realizations in the journey thus far for those who have chosen to participate. It is no coincidence that the following story is told under the subheading "The Drivers."

Table 34.3 Median net worth of households in US 2005 and 2009

	2009	2005
Whites	$113,149	$134,992
Hispanics	$6,325	$18,359
Blacks	$5,677	$12,124

Pew Research Center, Survey of Income and Program Participation, 2011. Retrieved from http://pewresearch.org

The authors describe the first time they met, a meeting that ended with a realization that they are struggling to reconcile with the goals of their project …

> We were dining in a South African restaurant with delegations of educators from both the United States and South Africa. Throughout the evening the authors' talked briskly and resolutely about the issues of wealth disparity and the accompanying uneven resources available in schools. We confidently shared stories of our work within our respective countries to even the playing field, for after all, the well-to-do had no more rights than the poor. At the end of the dinner, the US author noticed that the car key his new South African friend was holding sported a BMW logo. Surprised, he asked his friend if he owned a BMW. When the answer came back in the affirmative – and the US author explained that he owned the same model BMW -both had to laugh self-consciously. As it turns out the two arbiters of moral righteousness both owned expensive sports cars. Does this matter? How can it not matter we told ourselves. How can we ignore our own histories and privileges and possessions and how they shape our attitudes about inequalities?

Social (In)Justice and Educational Leadership

> Social Injustice – "Undeserved inequalities heaped on children." – John Rawls

The Courageous Conversations Project attempts to elicit frank discourse on the subject of race, poverty, and schooling, understanding that educational matters reside within the larger context of societal matters, i.e., the historical narratives and the challenges of equitable distribution of resources that still exist today. Believing as we do that school leaders can have a profound impact on not only the children they serve, but entire communities, we have chosen school principals in both countries to work with us on this project. The principals involved in this multiyear initiative have recently begun to engage in both domestic and international conversations about their experiences in schools. They have begun to share their perceptions and perspectives with one another, which has ignited a robust exchange. One example comes from a South African principal's epiphany about his perceptions of the disadvantaged:

> I was an economics educator for nearly 15 years … and never knew anything about the living conditions of people around me in townships. After this experience, I got involved with other learners who came from a previously disadvantaged background. This in turn introduced me to more people in circumstances and conditions that I never have experienced before. The more I got involved with young people from a different background, the more I realised that they had the same hopes and aspirations as the privileged learners in my

> school. The difference was that they lacked information, opportunities and support from their schools and communities. There was no way for them of realising their dreams without help from somewhere.

This same principal has his work cut out for him as he describes his current student body:

> … learners from our school are seldom exposed enough to the imbalances that surround them. They are unaware of the living conditions of others; they are unaware of the realities others are facing. They live in a world of their own where they never encounter poverty. The school uniform they wear is an equaliser as they all look the same in the school. They go home to their affluent neighbourhoods and live a 1st world life. They are never exposed to poverty, and they never get involved in anybody's life who is less privileged. They are totally ignorant of the needs of the people around them.

A school principal, as leader of the educational enterprise in a community, has the unique opportunity to use his or her position as a "bully pulpit" to tackle systemic and structural inequalities and to "disrupt" injustices. According to Theoharris (2010), the injustices that need disrupting include school structures that marginalize, segregate, and impede achievement; a deprofessionalized teaching staff; a disconnect with the community, low-income families, and families of color; disparate and low student achievement. Rather than become a victim of flawed policies, a strong school principal can set an agenda to change policy and practice as it affects the children in his/her charge and rouse others to action as well. It is for schools to take the lead in this matter, as Bogotch reminds us: "… there is no denying the educational fact that the primary role of educators is to extend privileges and develop voice in *others*" (Bogotch, Beachum, Blount, Brooks, & English, 2008, p. 14). We should see ourselves in the forefront of leading social change, not waiting passively for the impact of societal forces to shape our destiny.

An example of taking the lead in change comes from a principal of a well-resourced school in the USA. He describes the white enclave phenomenon which, while apparently providing a high-performance and successful school climate, ironically, does not serve his students well for living in the wider world:

> Equity is a priority in my school because of the students' lack of experience, i.e., no contact with students or teachers of color. They have no idea of what the rest of the world is like. One student after graduation came back and said to me: 'We could have used some background in how other people live; a little exposure wouldn't have hurt.' This is an extraordinarily isolated community geographically, and with the home prices, poorer folks could never afford to live here. Even though many kids in my current school are growing up in a privileged lifestyle, there is little if any racist language heard – it is a matter of 'we just don't want to live next door to them.' Parents have to be taught to teach their children not to be afraid of those who are different from them. If we don't tell our kids about this it won't happen. When I talk to PTAs and parent groups, I like to suggest that the (100 % college bound) kids in my school should be getting ready for the wider world. For example, I say to parents, 'What if your child has a black roommate in college?' When I put the issue in these terms it is not a condemnation of the community, just a bit of reality for the future to help their kids.

School leaders need to set direction for change to take place. George Counts, in "Dare the School Build a New Social Order," asks us to consider this possibility: We seem to be more interested in *action* than we are in *direction*, so we go around in circles (Counts, 1978). As a planned movement to reduce and eliminate social injustice in schools, this project is *committed to moving in a direction* and is fueled by the courage of the participants to move beyond the comfort of the circle they have been used to. This moral compass directs us to an "aspirational space" (Alexander, 2004) to motivate others to join us in these conversations. This space bestrides the twin phenomena of poverty and race and attempts to unpack the economic forces at work as well as the family and social capital underpinnings of youngsters in South African and US schools. For the school leaders who are involved in this project, we expect no less than steadfastness of purpose and a resolve to "make things happen." They have pledged to contribute to the project in the spirit of social change.

The Courageous Conversations Project challenges the authors and their colleagues to become culturally responsive. In the initial stages of the project, we are gathering the resources and background knowledge to make the steep climb towards cultural responsiveness. We intend on scaffolding this work through dissemination of literature and research coupled with numerous opportunities for dialogue about becoming such a leader. We intend on approaching the task from several angles, including supervision of teachers, sensitivity to written and oral communications, interacting with students, and disrupting extant injustices.

As the principals in this project take on the role of culturally responsive leaders, they sign on to becoming role models for their teachers, no simple task, as Buehler, Gere, Dallavis, and Haviland (2009) point out: "Beyond knowledge and skills, culturally responsive teachers must command affective qualities such as courage, will-power and tenacity" (p. 409). This is particularly true for white beginning teachers who "work with students of color for the first time, the process of examining their assumptions about race can bring on emotions of uncertainty, insecurity, and fear. Such introspection, which is essential for culturally responsive educators, requires a degree of emotional risk for which many beginning teachers and teachers educators are unprepared" (p. 410).

A gauntlet awaits those school leaders who wish to engage in disrupting injustice. Many of the challenges center on incorporating language and cultural differences into the school and monitoring how staff and faculty respond to behaviors of students from different backgrounds:

- "… to find their way into writing, children depend on the familiar and typified voices of their everyday lives – the voices of families, friends, media figures, and teachers. These voices literally reverberate in their own as the children orally articulate what they are going to say and monitor its encoding on the page…. a curricular and pedagogical knowledge of young children's languages is important in identifying and helping young children meet the challenges they experience in figuring out how to make a voice visible on paper" (Dyson & Smitherman, 2009, p. 978).
- Language is still a contentious and highly emotive issue in South Africa. Despite the fact that Xhosa is spoken by Nelson Mandela and ten million other South Africans, a 16-year-old was recently disciplined in her school for speaking in Xhosa,

her native tongue. The "… languages of South Africa's colonizers still rule in the classroom and elsewhere, a recipe for resentment …"(Bryson, 2010, p. 1).
- Jansen (cited in van Wyk, 2010a, 2010b) points out that in South Africa, there are hundreds of little incidents, unseen and unrecorded, that happen to younger and older students because of race every day in the South African educational system. He points to a formidable research literature which shows that in South African schools, the grouping of children, the dominant assessment practices, the learner preferences of the teacher, the display of cultural symbols, the scope of awards and rewards, and the decision of "who teaches what" are all organized in ways that show preference based on race (as well as social class, religion, and gender).
- At a recent conference, hosted by the US departments of Education and Justice, the assistant attorney general for civil rights unabashedly addressed the "disparate impact" of discipline in US schools: "Regrettably, students of color are receiving different and harsher disciplinary punishments than whites for the same or similar infractions, and they are disproportionately impacted by zero-tolerance policies- a fact that only serves to exacerbate already deeply entrenched disparities in many communities" (Zehr, 2010, p. 1).
- "For… minority children, especially in the contemporary social context, educational resources and opportunities must include integrating their language and cultural experiences into the social and intellectual fabric of schools, much as these have always been seamlessly integrated into the education of privileged White children. In education, power is transmitted through these social relations, representations, and practices, which determine whose language and cultural experiences count and whose do not, which students are at the center and, therefore, which must remain in the periphery" (Moll, 2010, p. 454).

This work is not for the faint of heart. Understanding the educational implications of the challenges inherent in an initiative involving multiculturalism "requires open, honest, and public discourse rather than the more typical safe, constrained, and politically correct thinking often expressed in schools" (Shields, Larocque, & Oberg, 2002, p. 118). Furthermore, school leaders interested in social justice must practice dispositions that can lead to growth or change, particularly emphasizing courage and initiative for this project. Courage and initiative as a disposition in schools require "Discussing uncomfortable topics or issues … accepting the discomfort that stems from the need to change and seeking or accepting new or unfamiliar roles, responsibilities or challenges" (Martin-Kniep, 2008, p. 4). This courageous disposition takes on added significance given the history of researcher attempts to investigate issues of race and poverty in schools:

> "… conversations in schools rarely addressed the complex issues raised by multicultural school populations. Frequently educators seemed uncomfortable when topics were raised, either changing the subject quickly or engaging the issues in highly emotional ways. Indeed, we became increasingly aware of a general lack of willingness to engage in dialogue about race and ethnicity, perhaps because educators consciously hoped to avoid the arguments and conflicts that often accompany such conversations, but more likely, because they simply did not know how to address the issues." (Shields et al., 2002, pp. 118–119)

Table 34.4 Guiding questions for the conversations, developed bilaterally by faculty, principals, and educational directors

1. How would you define educational equity and redress?
2. Is equity and redress important to you as a school leader? Explain.
3. Describe some of the equity and redress challenges that exist within your school.
4. Describe some of the equity and redress challenges that exist between your school and other schools within your district.
5. What attempts, if any, have been made recently to address equity and redress issues in your district? Have these attempts been successful, in your estimation?
6. What is the role of government in ensuring equity and redress?
7. What is the role of parents in assuring equity and redress?
8. What are the major equity and redress areas that you feel need to be addressed in today's schools?
9. How does funding affect equity and redress?
10. Give one example of the effects of an equity and redress imbalance on a student you know.

Creating an Environment for Authentic Voices

The overarching philosophy for the project, drawn from the tenets of critical race theory, is primarily interested in provoking change, not just recording information. It attempts to go beyond the dominant discourse to a place of honest communication about sensitive matters. Much as Albert Einstein came to believe that simple language had the power to convey ideas that were both deep and disturbing to push the boundaries of the physical world (Isaacson, 2010), we believe in the power of simple, unalterable truths to push the boundaries of the social world.

Questions, developed with the assistance of principals, public school directors, and university faculty – see Table 34.4 below – are being used to gather data to inform the work and to stimulate discussion within and across project locations. (Note that the sample above is used for the South African version of the survey; the term "equity and redress" is most popularly associated with the definition of equity in South Africa. For the US version, the word "equity" is used alone). In addition, notes and commentary from other forums presented under the aegis of the Courageous Conversations Project are being compiled.

In addition, we borrow from those who have considered how to stimulate direct and frank conversations. "What is my role in creating change?" and "Can I be fearless?" (Wheatley, 2009) are two foundational questions that we ask. In addition, we refer often to the concept of equity audits wherein thoughtful and thorough protocols are used to burrow into a school's culture; we arrive equipped with skills to avoid "equity traps" (Skrla, McKenzie, & Scheurich, 2009, p. 101) on the way to becoming "equity –oriented change agents" (p. 70).

Opportunities for Conversation/The Medium as Message

Principals who are participating in the study are drawn from the ACE program (a professional development program for school leaders) in South Africa and from two New York State professional organizations in the USA. These transatlantic school leaders will share many experiences during the course of the Courageous Conversations initiative. The uniqueness of the project may very well be its greatest strength. Attempting to discuss race, poverty, and schools within one's country, a conversation which will undoubtedly be laced with emotions associated with injustice, nevertheless, can be somewhat predictable. Too often, the usual suspects – politics, financial hardships, and historical inertia – are trotted out by partisans on both sides of the argument. As one South African principal noted:

> It is easy to go into the blaming mode: parents from wealthier backgrounds blame people for just demanding more and more and for lowering standards. Parents from less-prosperous backgrounds can blame the past for the inequities. Both these groups of parents have a responsibility to instill a new set of values in their children.

In these "blame storming" (McDonald, 2009) conversations, talking points abound, suspended in a calcified discourse. However, by discussing and experiencing these matters across an ocean, there may be a phenomenon at work which operates like the opposite of the distortions found in a fun house mirror. In our case, we may be holding up a mirror which lends clarity and deeper dimensions to what is observed. At a church in South Africa, the US author had experiences which may be illustrative of this clarity and depth:

> During my visits to South Africa, I attended evening church services set aside for university students. The first time I attended the service I was impressed by the upbeat and youthful presentation by the pastor (a rock band served as the musical accompaniment) and his message of peace and hope. As I looked around the 500-plus seat auditorium, I noticed that there were two or three black faces. I was overcome with emotion as I realized that I was in a house of worship, located next door to a preeminent institution of higher learning, populated by the next generation of South African leaders and intellectuals … and all the faces but a handful were white. I walked back to my hotel room through the university campus, stopped along the way, and cried on the steps of the education building. During my next visit to the church about a year later, I attended the same service, but this time when I looked at the few black faces in the sea of white, I tried to be more intellectual and less emotional – after all, I was a scholar involved in research. This worked until the rock band sang a song as the lyrics were projected on large screen TVs throughout the cavernous church. The lyrics read, in part: '… may oceans of justice flood through your heart. May rivers of fairness touch every part …' My emotions gripped me again and I found myself screaming inside: 'OCEANS OF JUSTICE? RIVERS OF FAIRNESS? THEN WHERE ARE THE BLACK PEOPLE?'

Moll (2010) suggests that creating opportunities for honest conversation may be needed now more than ever: As he observed and participated in groups that discussed social justice issues, he noticed that they became "… a setting to reflect upon and discuss how we thought and talked about differences, to challenge stagnant notions of culture, and to analyze within-group variability. In so doing, we came to realize the crucial importance of creating 'additive' conditions for learning, not only for students, but also for teachers. This is imperative in the rapidly changing demographic context of schools. It is also a tall order … especially in the current context, with all the imposed constraints of 'accountability' or 'market' models" (p. 455).

The project leaders have visited each other's countries on several occasions. Each time there has been a forthright discussion run by the visiting professor on the troubled state of affairs in his home country. This willingness to openly criticize one's homeland in another nation sets the tone for others to follow. We have found that these presentations have yielded enormous frankness on the part of the principals and faculty associated with the project in each country.

While we are learning about our differences, we learn much more about our similarities. Children have physical, social, and psychological needs that transcend national boundaries. This seems best expressed by a US principal who offers this simple but profound notion:

> Every kid wants to be loved. If they can't be loved they want to be respected. If not, then they want to be noticed. Watch how this plays out in every school and community and you get a sense of why children exhibit different behaviors.

Live webcasts with principals and faculty from both countries are being broadcast periodically. During these sessions, there is a palpable momentum in both locations to get to the bottom of things – to tell the truth. Questions asked provoke each side to unpack what their homeland is like. A website devoted to the groups' mutual concerns has been developed, a place to share ideas and exchange documents. Excursions to both countries by visiting principals are in the planning stages. These media experiences and plans for direct contact have produced an atmosphere of trust, energy, and enthusiasm for the work. We believe that this climate has begun to engender the type of courageous expression that will be at the heart of the project. Below are comments from school leaders in both countries, reflective of the initial stages of unpacking the truth about race, poverty, and schooling.

A South African principal in a traditionally underserved community exposes some of the fundamentals of continuing resource inequality, including long-term underinvestment in facilities and teacher training for South Africa's poor ….

> Racial groups in 1994 start out on an uneven playing field and equal treatment does not in and of itself go far enough. Hampered by decades of underinvestment in school facilities and in the quality of teachers serving black and coloured students, uniform funding formulas for current operating spending will not provide the same educational opportunity to these students as to white students – there should be fair equality of opportunity for social and economic advancement. Some of the pressing problems at my school are the lack of classrooms, hostels and sport grounds as well as appropriate learning support material. To set a realistic budget the staff raises funds by means of fundraising projects with little support of the parents. The focus of our primary task – to teach- now has moved to raising funds. The legacy of the past is also evident in the qualification of teachers. Many teachers received their education in the impoverished coloured schools that have since been closed. This resulted in a lot of mathematics and science teachers being underprepared in those fields. Within our circuit we have very rich schools which build extra classrooms, media centres and multi purpose halls out of own funds and money from rich donors. The affluent parents are able to enhance the quality of their child's education by the high school fees they pay and it being used to supplement the resources… public schools in South Africa will continue to consist of two tiers, one privileged and well-resourced and the other poor and disadvantaged. The public schools with high levels of private income continue to have lower teacher learner ratios, attract better qualified personnel and have substantially better instructional resources.

A principal of a well-resourced South African school waxes eloquently and forcefully for the moral imperative of the privileged seeking ways to help the poor and to develop empathy for their plight, while at the same time not lowering their own aspirations. This thorny dilemma begs the question: Can the wealthy and privileged maintain what they have while assisting the less fortunate?

> Due to our past, schools and school communities experience a huge difference in providing opportunities. It is therefore the role of government to redress this imbalance. While the government is responsible for the redress of this imbalance between government schools, communities in more affluent areas are investing in their schools in various ways, making this divide between schools appear even bigger. Redress cannot take place by taking away from or equalising the more prosperous schools in the system. To punish a well-resourced school and to get them on the same level of under resourced schools is not redressing. More prosperous schools have a duty, as part of redress, to prepare their learners to enter into a world where there is poverty, imbalances and other challenges. These schools need to educate their learners, and expose them to the realities of their communities.
>
> The challenge for me in this regard is how to redress the imbalance I know that exists without lowering standards in my school or taking away the strive for excellence that exists in my school, while at the same time assisting other schools and learners. The school would like to appoint people from different races to serve as role models for learners, but at the same time the school is not prepared to lower requirements just to appoint a less qualified person – this applies to all people of all races who apply at the school. The perception therefore exists that the school is excluding people of different races.
>
> In many cases … applications [for my school] come from learners from less-resourced schools, and being the stronger learners in their schools, their departure weakens the society and schools they come from, thus creating more inequality. Until government and under-resourced schools acknowledge the role and importance of an educator who is disciplined, well-trained and has a healthy work ethic, redress efforts will remain fruitless. As this is very difficult for government to do, it seems easier to focus on well-resourced schools and trying to blame them for inequalities and imbalances, and trying to make them feel guilty or pay for achieving while others are not. They create an atmosphere where well-resourced schools are supposed to feel guilty about imbalances and should therefore accept anyone and everything for their schools – let us all rather be mediocre than having only a few performing schools.
>
> It is strange that well-resourced schools are seen as unacceptable and not being part of the new South Africa, and that they are not operating within the spirit of an all-inclusive society, but the government (and school leaders from disadvantaged schools) send their children to these schools. By doing so, they acknowledge the quality of education provided by these schools and at the same time they show a vote of no confidence in other schools or their own abilities to address the perceived problems in the school system. What must be expected from parents in the South African context is to expose their children to the realities around them. They should make their children aware of the society we live in. They should encourage their children to become involved in the lives of the people around them. They should encourage their children to assist people around them with emotional, functional or financial support. Parents from less-prosperous circumstances should try to cultivate a culture of hard work and discipline amongst their children.

A US principal of a traditionally underserved community with a diverse population weighs in on issues of entitlement, shares a chilling reminder that society pays a heavy price through its prisons if we ignore the needs of youngsters – borne out by a recent NAACP report linking high incarceration rates with low performing schools (Wrobel, 2011) – and makes a suggestion for communicating between groups ….

> If minorities can afford to send their kids to a private education, then they increase their chances of their kids succeeding in college and beyond. Private schools are looking for minority kids. In many minority schools you find a lack of leadership and a lack of resources. In many of these places, the administrators are chomping at the bit to improve

> their schools, but they just can't raise the money. In more privileged places they even have foundations to give their kids even more. One of the stumbling blocks to equity is a sense of entitlement. I am entitled because I am white, because I am a doctor, etc. The black kids say the same thing: I am entitled to what the white people have. The resources we expend on the penal system as compared to the school system should enter into the conversation. Put the money we spend on prisons into our schools and the entire equation would change. Turn the schools around and you would not have the need for prisons that we do today. What if we did this: once a week kids from a privileged environment mix with kids from an underserved environment? They meet to discuss their aspirations. The kids might buy into this. If you start this electronically – maybe through social media – the communities might buy into it.

Conclusion/Just the Beginning

As we develop our conversations, the authors reflect regularly on a caveat regarding the work. We need to remind ourselves that what we regard as noble work, nevertheless, does not allow us to presume to speak for those less fortunate. We keep our arrogance in check by remembering the advice of Sbu Zikode, the leader of a poor people's movement in South Africa: "Supportive people should talk with the poor, not for the poor" (Zikode, 2010).

We close with some sobering thoughts for all communities to consider.

> Racism is not a biological fact. Racism is not an idea, nor is it merely expression of dislike or hatred. Racism is an ideology, an ideology with a history. It has no basis in biology, no genetic reality – there is more genetic variation among people of similar ethnic ancestries than between those with distinct ancestries. Moreover, the ideology of racism in America does not coincide with the history of slavery. Racism did not cause slavery nor did it die when slavery ended. Indeed, it became more virulent in the decades after emancipation (Attie, 2010).
>
> Racism refers to the use of mainstream rank against people who don't have enough social power to defend themselves. Racism is always social abuse (Mindell, 1995, p. 151).
>
> Those who are racially marginalized are like the miner's canary: their distress is the first sign of a danger that threatens us all. It is easy enough to think that when we sacrifice this canary, the only harm is to communities of color. Yet others ignore problems that converge around racial minorities at their own peril, for these problems are symptoms warning us that we are all at risk (Guinier & Torres, 2002, p. 11).

This chapter contains a set of guideposts for action. Believing as the authors do, that social justice in the schools of their countries will not happen without painful reflection and dialogue, they have drawn inspiration from those who have examined the landscape. Trailheads appear that we know we must follow if we seek the truth. Bogotch et al. (2008) implores educators to take the lead in shaping society. We have signed on for that duty. Our task, therefore, is to unpack the truth and set it out, unvarnished, for all to see. Only after the interrogation will come the healing and the solutions. This work has become a cri de coeur for the authors. The work is our passion and we have offered ourselves as examples of fallible individuals who harbor biases and resentments that need to be examined. We seek to make a difference. We are driven by our own undying belief that if our societies could shake the yoke of their respective narratives, come to terms with the drivers of inequity and engage in forthright conversations with school leaders, social justice will be served.

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Chapter 35

Schools for Justice in the United States

Ivan Greenberg

In the history of American education, adult schools for social justice are little noticed, but importantly, their development can help to bring into focus ways education can serve the cause of social change. Overall, adult education in America has taken a variety of forms. Since the early twentieth century, these schools emerged as an alternative educational experience to develop political consciousness and participation in social movements. They often operated outside the regular public school system organized along class, race, gender, and ideological lines to teach adults to question authority and to rebel rather than submit. For example, working-class labor leaders believed wage earners should study the labor process to understand the role of capitalism and the market economy in structuring inequality and exploitation. Trade union education programs increased consciousness of the political economy and prompted organizing to transform workplace relations. In a similar way, African American leaders believed their people could not be educated about their history and culture within the dominant school system. During the modern civil rights movement of the 1960s, they established independent "freedom schools" to educate activists about where they came from and the historical obstacles they faced. Meanwhile, ideological socialist schools taught radical political philosophies and urged allegiance to third parties. Adult schools associated with Socialist and Communist groups flourished between approximately 1900 and 1960 and became the largest segment of the adult education movement.

The justice schools differ, for example, from Colonial era (1600–1776) schooling to advance the study of the Bible, as well as twentieth-century work-related or industrial vocational training. They also differ from modern efforts to "Americanize" immigrants by teaching civic culture, nationalism, and literacy. In contrast to regular public schooling, teachers eagerly engaged "power" questions touching on existing injustice. Rather than serving counterrevolutionary purposes by instilling

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an unquestioning allegiance to existing American institutions, justice schools advanced an alternative pedagogy that aimed to help "ordinary" people understand their subordinate place in society, the sources of their oppression, and to think about ways to become empowered in liberation struggles. These schools provided a safe space for the discussion of controversial ideas in a participatory classroom that included an emphasis on public speaking rooted in collaborative, rather than competitive, relationships. Long before the publication of Paulo Freire's *Pedagogy of the Oppressed* (1970), progressives provided alternative practices to the established school system. In this instance, educational leaders often doubled as social movement leaders. They hoped to inspire and mobilize students to make a better world by looking anew at themselves and at society.

The schools usually appealed to an undereducated constituency. Working-class Americans often viewed regular schooling as less of a priority than participation in the labor force at young ages. Low-income families relied on the income of their children to meet basic family needs. This "family economy" only began to change during the 1920s and the 1930s when the combination of child labor laws and compulsory school attendance laws prompted rising high school attendance rates.[1] Yet, even as American high school education became widespread after World War II, unequal conditions – such as tracking and racial segregation – disproportionately affected poor and excluded groups.[2] The adult justice schools could provide an opportunity for education not previously available, and their unique subject matter attracted people interested in learning to advance social action.

Progressive educational leaders long have hoped that schooling could advance an egalitarian, just society. Schooling best can serve as a model for democratic community when it addresses how social class differences, as well as difference along race and gender lines, separate teachers from students. The learning systems of professional, middle-class educators may not be relevant always to the realities of working-class life, and the beliefs and values held by those below them in the class structure. Working-class adults often embraced collectivist traditions, stressing mutual aid. Visions of social transformation based on universalistic values and personal expression are most effective when combined with an approach that privileges solidarity in groups and identifies and confronts power structures.

Immigrants and Workers

Justice schools arose during the Progressive era (1890–1920) as part of the Settlement House movement. As approximately 24 million low-income immigrants from eastern and southern Europe (Italy, Poland, Hungary, Greece, and Russia) established urban ethnic enclaves in America, the new Settlement Houses aided them by providing social services, including education. The prototype was Toynbee Hall in East London established in 1884, and the idea soon spread to America. By the time of World War I, several hundred Settlement Houses were operating in poor urban areas. One of the earliest and most successful was in Chicago, where iconic reformer Jane Addams established a night school for adults at Hull House to teach English and help working-class immigrants adapt to their new surroundings. The school differed from government-funded "Americanization" education: Instead of promoting conformity to American civic culture and the political status quo, the Settlement school advocated reform to improve neighborhood life and humanize conditions in industry. At Hull House, visited by as many as 2,000 people each month, the adult school offered reading groups as well as college extension classes in a free-speech atmosphere that promoted democratic cooperation, defended worker and immigrant rights, and organized for female suffrage. Addams was influenced by John Dewey's idea of the "full-service community school." In a 1902 speech, "The School as Social Centre," Dewey argued that urbanization and immigration placed enormous demands on social systems and the community school must respond to organize support services by fostering strong partnerships and building on community strengths, including diversity.[3]

Settlement schools established a legacy referenced by recent advocates of community schools. Former Chicago school chancellor Arne Duncan – later Secretary of Education in the Obama Administration – headed efforts to integrate academic and social supports to students and families.[4] However, while school-linked health and social services filled a gap in a fragmented social service system, they almost never promoted political education or a protest agenda.

Progressive trade union leaders long embraced a labor-centered adult education movement, which achieved its greatest popularity during the first half of the twentieth century. In 1921, educator Fannia Cohn of the International Ladies Garment Workers Union (ILGWU) proclaimed: "The Labor Movement strives toward a new life. It dreams of a world where economic and social justice will prevail….where society will be organized as a cooperative commonwealth….To attain this end it is necessary to develop a social conscience and a sense of responsibility in the labor movement. With this end in view, we set out to organize our educational work."[5] The ILGWU, whose membership reached about 200,000, operated several education centers in New York City offering classes in economics, history, philosophy, art, literature, music, drama, as well as the English language.[6] At about the same time, labor intellectual Arthur Gleason, who worked with the United Mine Workers, argued: "Workers' Education does not say 'Come and be comfortable.' It demands the impossible."[7] Ralph Tefferteller, who helped direct educational programs at the Amalgamated Clothing Workers Union (ACWU), recalled helping "union members form drama groups to develop plays that had some social content….or hold seminars on the meaning of industrial democracy in America, or the history of the labor movement, or of various types of industries to help newcomers to the industry understand what the old-timers who fought to bring organization went through, and understand what they had inherited without having to fight for it."[8]

During the 1920s and 1930s, independent residential labor colleges enrolled hundreds of workers.[9] A student of the Brookwood Labor College recalled: "Many of the students were miners and textile workers and factory workers who would go back to their own local unions better informed and with a deeper background. The point was to make their own unions better."[10] The Women's Trade

Union League (WTUL) promoted separate education for women workers offering classes in economics, public speaking, writing, and organizing. By the early 1920s, summer schools for working women also enjoyed a high level of popularity. The school at Bryn Mawr College, which operated until 1938, annually enrolled at least 60 union women.[11]

At its height in the early 1950s, trade unions represented about 35 % of the nonfarm workforce. Union education programs taught not only work skills and training but also the study of social problems and workplace inequities. They tried to empower their membership to take part in union affairs and to develop class consciousness by teaching the history of working people. Moreover, leadership courses to current and emerging union leaders helped equip them with the skills and knowledge to be effective labor advocates. The extensiveness of these efforts often reflected a union's commitment to either "solidarity unionism" versus "business unionism." In the former instance, education was central to creating rank-and-file dynamism. In the latter, union bureaucrats feared bottom-up activism reluctant to mobilize through education programs.

Since the late 1960s, the national AFL-CIO labor federation, which currently represents about 13 million workers, operated the National Labor College (NLC). NLC is the only accredited college in the nation dedicated exclusively to union leaders, members, activists, and staff. Approximately 70 week-long continuing education classes address organizing, negotiations, arbitration, and workplace safety and health. Moreover, leadership development is a major initiative at many national unions. The Service Employee International Union (SEIU), which enrolled about two million members in 2011, provides on-site work leaders (known as stewards) education and training to "get an overview of the history of the Labor movement and the history of the Service Employees International Union. Stewards are able to explore the different aspects of the work-site leader…Stewards leave empowered and are equipped with the necessary tools to activate their worksite."[12] At the United Auto Workers (UAW), which represents about 390,000 members, a summer family education center accommodates about 450 students of all ages.[13] Education efforts at the United Electrical, Radio and Machine Workers of America (UE), which represents about 35,000 workers, incorporates "political education that counteracts corporate media influence and promotes a working class consciousness and alternatives to the corporate agenda." The union tries to reach the broader community, including nonunion workplaces, and provides "materials and classes to area schools to educate students on the union's values, principles and contributions to society."[14]

The AFL-CIO formed several educational bridges to nontraditional constituencies. Its Union Summer college student internship program, which graduated about 3,000 activists during the last 15 years, played an important role in mobilizing anti-corporate United Students Against Sweatshops chapters on more than 200 campuses with the help of the United Steelworkers Union. The anti-sweatshop movement, addressing the needs of wage earners in poor nations, represents a new model for student/worker transnational solidarity.[15]

Old Left Schools

Before World War II, socialists, communists, and anarchists established their own adult schools to build a radical movement directed to class struggle, not social mobility. The Rand School of Social Science in New York City; the Work People's College in Duluth, Minnesota; the Jefferson School of Social Science in New York City; and the Highlander Folk School in Monteagle, Tennessee, each demonstrate how schooling could serve as an agent for social change.

The Rand School (1906–1956) had close ties to the Socialist Party of America as well as the AFL's needle trades unions. Rand offered full-time instruction to several thousand students and ran a summer camp for adult socialist and trade union activists. While situated in New York City, it pioneered long-distance learning. By 1916, about 5,000 people from around the nation enrolled in courses by mail. The school's Department of Labor Research also published the *American Labor Year Book*, an important comprehensive volume of articles to chronicle the struggles and achievements of labor unions throughout out the world. Rand's curriculum included socialist theory, economics, American history, and literature. A course titled "Economic and Sociology of the Negro Problem" was offered as being of equal value to black and white students. It presented "in a scientific manner the fundamental facts covering the relations between the white and colored peoples in the United States, with especial reference to the economic and political struggles of the working class, so as to substitute knowledge and mutual understanding for prejudice and vague sentiment." Outside speakers were solicited for the class on "Current Labor Problems." "At each session some live issue in the labor movement will be discussed by a man or woman active therein." The "Elements of Economics 1" course provided knowledge to aid an understanding of socialist theory. "A study of basic ideas in economic science, aiming to develop a clear understanding of the significance of such terms as Commodity-Production, Price, Value, Wages, Surplus-Value, etc."[16]

In the era of World War I, the faculty boasted luminaries Scott Nearing, Charles Beard, James Harvey Robinson, Algernon Lee, Charlotte Perkins Gilman, and Bertha Howell Mailly. But its model of education proved controversial. During the first Red Scare (1919–1920), police raided the school at the urging of the New York State Lusk Committee and seized attendance records. The government prosecuted Rand, which was forced to pay a $3,000 fine, for violating the Espionage Act when it published an anti-war pamphlet, "The Great Madness," by Nearing. The Lusk Committee tried to close the school by court-ordered injunction, but Rand prevailed in a series of court cases in 1920 and 1922.[17] It then expanded its course offerings and increased student enrollment. The curriculum began to shift from socialist instruction to the new areas of child development, home economics, juvenile delinquency, race relations, peace education, social work, as well as trade union policies. Progressive intellectuals such as Franz Boas, Marc Connolly, Stephen Vincent Benet, Bertrand Russell, and August Claessens joined the faculty. John Dewey remained a friend writing in 1933 that "friends of enlightenment and sound adult education must see to it that its great work is not brought to a close for lack of funds." However, after World War II, emerging McCarthyism and the second Red Scare contributed to declining attendance and financial troubles.[18]

The Industrial Workers of the World (IWW) or Wobblies led the Work People's College (1907–1941), which initially grew out of the Finnish immigrant radical experience. The Wobblies wanted to cultivate class consciousness and revolutionary direct action. In their view, classroom instruction supplemented the practical education workers received at the point of production and would create a new cadre of union organizers. Their revolutionary principles were articulated in the official course book: "The school recognizes the existence of class struggle in society, and its courses of study have been prepared so that industrially organized workers, both men and women, dissatisfied with conditions under our capitalist system, can more efficiently carry on an organized class struggle for the attainment of industrial demands, and realistically of a new social order."[19] The curriculum included classes in labor history, sociology, public speaking, writing, bookkeeping, geography, economics, biology, and arithmetic. The labor history class assigned Friedrich Engels, *Origins of the Family, Private Property and the State*, and Karl Marx*, The Eighteenth Brumaire*. The Public Speaking course urged "students to prepare lectures of propaganda value. Lecture to be given to class as if an audience of workers." Articles prepared in the writing class were published in IWW publications. Despite efforts to reach a broad segment of the working class, the College only enrolled about 70 students annually during the 1920s.[20]

IWW pedagogy rejected route learning and the top-down transmission of knowledge. There were few timed exams and competitive grades. As Richard J. Altenbaugh notes, "The school exposed students to classroom situations that encouraged them to articulate their experiences, to raise their level of social consciousness, and to give them practice in speaking before groups."[21] Student Eli Hill wrote a humorous poem about how the school day began:

> At nine o'clock sharp the class bell would crash,
> To classroom B they'd go in a dash;
> The room would be full of hoots and cat-calls,
> But the noise was abated by Fellow Worker Hall.
>
> Next is the period of Charlie Marx,
> This is a class where they all have bad marks;
> [Fred] Thompson calls Marx a volume of jokes,
> But I think he's screwy, it's nothing but a hoax.
>
> Some would go back to wrestle with Marx,
> While others would be torturing their saxophones and harps;
> Industrial Unionism is neither tabooed,
> For it's ambitiously studied in room twenty-two.[22]

IWW leaders also founded their own school for children to counter the teachings of the regular public schools. Elizabeth Gurley Flynn, an organizer of the IWW-led Lawrence, Massachusetts, textile strike in 1912, believed established schools tried to turn the children of the strikers against their parents. "Some of the teachers called the strikers lazy, said they should go back to work or 'back where they came from.'"[23] William "Big Bill" Haywood, an original IWW founder, also believed established schools assumed an antiunion role during the Paterson Silk strike of 1913 in New Jersey. The Wobblies organized their own children's meetings to counter this propaganda leading to "a school strike because the teachers had called the striking silk workers and their organizers 'anarchists and good-for-nothing foreigners.'"[24]

A different set of politics infused the Jefferson School of Social Science (1943–1956). The school offered Marxist adult education with ties to the Communist Party through the merger of two other Communist schools – the School for Democracy and the New York Workers School. Enrollment reached about 5,000 students each semester with the majority consisting of Party members and other recruits. Several teachers, including historians Philip S. Foner and Herbert Aptheker, had been dismissed from New York colleges because of their radical politics. Along with schools in several other cities, Communists ran the largest system of adult education in the nation. Their slogan, "Education for Jobs and Peace," was directed at "the whole mass of the people" with the exception of "known enemies of the working class." There was nothing secretive about the Jefferson school's operation, although during the late 1940s, teachers did not take formal attendance to protect the identity of students from government reprisals.[25]

The school's large library held about 30,000 volumes and as many as 15,000 pamphlets. Their curriculum combined the teaching of Party ideology and programs with broader subject matter, such as art, music, and drama. Within 2 years of its founding, the school offered about 400 courses in a dozen different fields with classes taught not only at its main campus but also at union halls. Although the course list ranged over many areas of study, the underlying socialist principles were expressed in the school catalogue: "The School teaches the principles of scientific socialism, Marxism, analyzing both world socialist developments and the distinctive problems of advancing the cause of socialism in our land." Most teachers shared Marx's maxim not only to interpret the world but change it. Faculty led lunch-hour talks at factories and other workplaces and with staff formed their own union to negotiate with the administration.[26]

Myra Page taught short story writing for over a decade at the Jefferson School and recalled the Left's limited interest in feminist issues. "I taught a class on women for one term, but they didn't ask me for the second term. Perhaps they thought I was too outspoken. I said things that were probably undiplomatic at the time. Mainly, the Left wasn't ready for what women were saying or doing, and they didn't think a course on women was important enough to offer again."[27] In 1944, the school offered a course, "Beauty and Fashion Clinic: Making the Most of Your Appearance," directed at working women. Typical of the limited gender politics of the time, the women were told that their appearance mattered to gain respect from both male bosses and union comrades, and even from men in the Party.

Similar to the experience of the Rand School, the Jefferson School faced government repression. In 1953, the U.S. Justice Department compelled the school to register as a Communist-front organization. FBI informers posed as students and infiltrated classes taking notes on both teachers and students. In 1956, the government forced the school to close but some staff and students later affiliated with the small New York Marxist School.

In the South, the Highlander Folk School (1932–1961) served as a major educational training center for political activists. Whites and blacks worked and studied together, which may be the first example of integrated Southern education in America. Founded by Myles Horton and Don West, the school's original mission sought to teach "rural and industrial workers for a new social order." The school's basic philosophy held that the downtrodden as a group should address their own problems and "the teacher's job is to get them talking about those problems, to raise and sharpen questions, and to trust people to come up with the answers." [28] They hoped to train potential leaders from local communities believing that the solutions to oppression could be found in the experiences and communities of the oppressed. Labor education programs dominated the curriculum until a shift to civil rights for African Americans during the late 1940s and early 1950s. Highlander served as an important gathering place drawing Martin Luther King Jr., Rosa Parks, Fannie Lou Hammer, Andrew Young, and Stokely Carmichael to its classes and workshops. For example, civil rights pioneer Rosa Parks attended a workshop on desegregation several months before her decision to contest the bus system in Montgomery, Alabama, by refusing to give up her seat to a white man. Parks recalled: "I wasn't even aware of what it was like [at Highlander] until I came. I had heard there was such a place…. [you] could just enjoy the relaxing atmosphere without having to have color lines drawn anywhere."[29]

Highlander's workshops stressed the sharing of knowledge by all participants, and once solutions to problems were articulated, the staff emphasized questions of action to implement change. According to Horton, "Unlike people in school, there's no exams to put down and then you're through with it. You are here to act on it. It was education for action…Let's just plan what you are going to do when you go back [into your community]. Let's start talking about how you're going to use this new insight and understanding you've got."[30]

As part of a voter education strategy, Highlander established Citizenship Schools during the late 1950s to advance African American reading skills in order to overcome disenfranchisement literacy laws. The schools followed Highlander's philosophy that education should be based on the individual's experiences. Nontraditional teachers taught adults to read and write with the faith that voting could change their place in society. They taught the black masses to demand their democratic rights. The importance of the Citizenship Schools to the emerging civil rights movement was immense, and eventually the Southern Christian Leadership Conference (SCLC) led by Reverend King took over these efforts and expanded them. When the civil rights movement moved into a community to organize, the presence of Citizenship Schools proved a vital base to mobilize the local black population.[31]

The FBI viewed Highlander as "subversive" and collected several thousand pages of political intelligence. The investigation began in the late 1930s after complaints to the local FBI field office alleged Communist activities. In 1941, an FBI memo summarized the investigation. "Organization, location and directing personnel set out.

Lists of teachers and sponsors obtained. [Text redacted] sources of income indicate Communist Party support. Informants Chattanooga show heads of school attended Communist meetings. Affidavits and correspondence….show Communist teachings at school." Yet these conclusions were exaggerated as the FBI later concluded: "Due to its interracial character it [Highlander] has been the subject of numerous past allegations that it represents the headquarters for communism in east Tennessee. These allegations have never been substantiated."[32] Still, the Southern press engaged in Red-baiting. When Reverend King visited Highlander, an Alabama newspaper reported that he associated with a "communist training school." A visit by former First Lady Eleanor Roosevelt led a Chattanooga newspaper to blame the school for "forcing racial integration and the accompanying deterioration of harmony and disruption of goodwill upon the South…Mrs. Roosevelt's participation in the Highlander Folk School program will not raise either its reputation or hers....since both already have sunk so low."[33]

Highlander suffered a similar fate as the Jefferson School. The Georgia Commission on Education engaged in sensational Red-baiting beginning in 1957. In 1961, the state of Tennessee revoked the school's charter and confiscated its property. With Highlander closed, Old Left schools largely had disappeared.

Civil Rights and Community Organizing

The African American educational experience differed significantly from white Americans due to racial exclusion and oppression. Before the Civil War (1860–1865), literacy itself had been contested: Under slavery, blacks usually were forbidden to acquire reading and writing skills because slave owners feared learning would aid slave resistance and rebellion. After the Civil War, school segregation created inferior schools. Until at least the 1960s, racial inequities in education helped to deter African American advancement.[34]

In the South, civil rights activists developed their own schools as they fought white rule. In 1963 and 1964, the Student Nonviolent Coordinating Committee (SNCC) focused its attention on Mississippi and established more than 40 new "freedom schools." Spellman College history professor Staughton Lynd served as director of SNCC's education program, which reached an estimated 3,000 students of all ages. A SNCC report argued: "People who spend their working hours in the cotton fields and who are uneducated cannot ask such questions as 'WHY'? They cannot question the system of oppression which keeps them…and their children in the fields…or the plantations…Negroes and whites aren't allowed to know each other… How can a people who are separated from their fellow men live the truth?"[35]

The freedom schools reflected liberal concepts and an integrationist vision. SNCC told the volunteer teachers – including many Northern white college students – to implement a curriculum that "begins on the level of everyday lives and those things in their environment that they have already experienced or can readily perceive, and builds up to a more realistic perception of American society, themselves, the conditions the conditions of their oppression, and alternatives offered by the Freedom Movement." The teachers were not to impose a "particular set of conclusions" but rather to "encourage the asking of questions." These questions compared black schools with white ones and probed the social differences between the races. Students were encouraged to consider why poor whites often identified with the power structure.[36]

At the time, such an explicit discourse on power and race relations rarely would take place in the regular public schools. Most schools in the South remained segregated despite the U.S. Supreme Court decision in *Brown v. Board of Education* (1954), which ruled that "separate but equal" was unconstitutional. The process of implementing the decision at the local level proved slow and contested with protest and violence. As late as 1968, more than 90 % of both whites and blacks nationwide remained enrolled in one race schools. In order to resist integration, white Southerners established hundreds of private, white-only "segregationist academies."[37]

Most of the Mississippi freedom schools closed after 1964, but SNCC established other ones in Chicago, Atlanta, and Washington, DC. Black nationalist views began to have an influence in their design and operation. White teachers were excluded and the study of African history often replaced American history. English language use became a topic of controversy. Carmichael, who recently left SNCC to join the leadership of the Black Panther Party (BPP), argued that Black vernacular expressed resistance to American life. "There are cats who come here from Italy, from Germany, from Poland, from France – in two generations they speak English perfectly. We have never spoken English perfectly. And that is because our people consciously resisted a language that did not belong to us. Never did, never will, anyhow they try to run it down our throat, we ain't gonna have it."[38]

Radical "black power" philosophy motivated the BPP educational program, which developed several dozen small schools for children and adults. The Panthers, founded in Oakland, California, in 1966, embraced both a class and race analysis of American society. Schooling became a community control initiative to encourage participation in movements for revolutionary social change. The fifth point in the Party's Ten Point Platform and Program favored "education of our people that exposes the true nature of this decadent American society. We want education that teaches us our true history and our role in present-day society. We believe in an educational system that will give our people a knowledge of self. If a man does not have knowledge of himself and his position in society and the world, then he has little chance to relate to anything else." They supported a process of "educating ourselves and our children on the nature of the struggle and in transferring to them the means for waging the struggle…against the ruling class."[39] In a critical way their views echoed that of white radicals: The public school system disempowered students and taught adherence to a stratified, unequal status quo.

By offering a black-centered curriculum, the Panthers connected education to real-life contexts incorporating student backgrounds. They stressed their interconnectedness with oppressed peoples in other nations. The schools for children consisted of the Free Breakfast Program during the school year and the Liberation Schools in the summer. In Berkeley, California, Mondays was known as "Revolutionary History Day" and Tuesdays as "Revolutionary Culture Day." The political teaching sometimes became overly didactic when it featured recitation drills, where children repeated "Power to the People" with references to capitalists as "pigs who control the country" and "steal from the poor." In Oakland, the children of Party members attended a liberation school whose fieldwork included distributing the Party's newspaper to other youth, attending court sessions for "political prisoners," and visiting prisons.[40] In this turbulent era of protest, the government (again via the FBI) engaged in massive political surveillance against the BPP. Schools were placed under watch. In San Francisco, FBI agents noted the "potentially successful effort…to teach children to hate police and to spread 'anti-white propaganda.'"[41]

The Panther's adult education promoted Marxist, black nationalist loyalties. Teachers assigned such books as *Quotations from Chairman Mao Tse-tung*, essays by Panther leader Huey Newton, Frantz Fanon's *Wretched of the Earth*, *The Communist Manifesto* by Karl Marx and Friedrich Engels, studies of Malcolm X, as well as works by Kwame Nkrumah, Vladimir Lenin, and Che Guevara. The Panther newspaper, which reached a weekly circulation of about 140,000, was incorporated into the curriculum.[42] When the group's membership declined in the mid-1970s, many of its schools closed.

During the turbulent era of the 1960s and early 1970s, other excluded groups also organized their own adult education initiatives to advance the struggle for equality. As the women's liberation movement grew in popularity, led by such groups as the National Organization for Women (NOW), women across both race and class lines sought to rediscover their own history and culture.[43] Female education rooted in identity politics based its curriculum on female voices and experiences. Educational practices included reading circles, literary societies, as well as political consciousness-raising groups, which promoted empowerment. For example, beginning in the late 1960s, hundreds of consciousness-raising groups brought women together to analyze their lives without male interference. Group discussion built on personal experience and democratic participation. In 1971, the Chicago Women's Liberation Union advised: "A different topic could be chosen each week, and everyone discusses it in terms of her own life. Go around in a circle, each woman talking in turn so that everyone speaks; this keeps anyone from dominating a discussion and helps keep on the topic."[44] Ellen Willis notes these groups became "the primary method of understanding women's condition" while forming the early women's movement "most successful organizing tool."[45] Susan Brownmiller, who was active in a group organized by New York Radical Feminists, also believes the informal gatherings served as "the movement's most successful form of female bonding, and the source of most of its creative thinking. Some of the small groups stayed together for more than a decade."[46]

The feminist movement in Chicago supported a Women's Liberation School (1970–1976) offering 8-week courses to about 250 adults. The curriculum included "self-help" and general skills classes to provide women "technical expertise that they are unlikely to acquire elsewhere" such as "how to fix an automobile or repair an electrical appliance." The school offered workshops in childbirth and "Women and their Bodies." While other classes included yoga, photography, creative writing, and nutrition, the most important portion of the curriculum addressed political education: "Struggle for the liberation of women against sexism in all sections of society. Included in this struggle is the struggle for the right of sexual self-determination for all people and for liberation of all homosexuals, especially lesbians." Political instruction covered women's history and feminist theory, Marxism, family issues, and the politics of health.[47]

In the twenty-first century, female advocacy persists among teachers in organizations such as WE LEARN (Women Expanding Literary Education Action Resource Network) and the American Association of University Women (AAUW). Like earlier efforts, it is noted that literacy can become a tool "to see, connect with and act upon a bigger picture….working together and learning each others needs and perspectives in order to reach a shared vision of social justice for all people."[48] Teachers can become organizers for social change depending on the level of academic freedom tolerated in their educational environment. While adult literacy workshops and post-secondary education are very different settings, both hold the possibility to reach a disadvantaged population to challenge obstacles to equality.

In *Reveille for Radicals* (1946) and *Rules for Radicals* (1970), veteran community organizer Saul Alinsky urged activists to empower the disadvantaged to confront local power structures. Since 1940, his Industrial Areas Foundation (IAF) conducted workshops for thousands of community organizers to develop skills for mobilization. Alinsky hoped to develop "native leaders": The work of many organic "Little Joes" would help change the attitudes of people in their communities. The organizer became an educator who facilitated knowledge development based on participation in community activities and programs. For working-class and low-income people, participation would transform ways of viewing the world. As Alinsky said, it is only when "people are organized so that they have the power to make changes….[that] they begin to think and ask questions about how to make the changes."[49] He focused on working-class groups to foster "democratic solidarity" – a consciousness rarely taught in regular schools or promoted by mainstream educators. As Aaron Shutz notes, "the organizer educated through action, by encouraging people to confront inequality and using these confrontations to nurture understanding and reflection."[50] During the last 30 years, other organizations followed Alinsky's lead, such as the PICO National Network, Gamaliel Foundation, Direct Action and Research Training (DART), and the Midwest Academy. At the Midwest Academy, more than 25,000 grassroots activists from hundreds of coalitions and organizations were trained since the early 1970s. The curriculum includes how to build coalitions, recruit volunteers, work with community boards, plan and facilitate meetings, media relations, working with religious and labor organizations, and fundraising.[51]

Conclusion

The historical literature on U.S. education generally neglects the history of adult education.[52] Scholarship concentrates on regular public schools, although some studies venture into urban communities to look at parental attitudes[53]; the relation of education to the economy and patterns of social mobility[54]; and the varieties of school reform.[55] Early revisionists focused on the ways public schools served the needs of corporate elites to train and integrate students into the capitalist economy.[56] Even within this frame of reference, too little emphasis is placed on the history of students, specifically how students interact with one another and also how they receive the lessons of their teachers. Moreover, few historians of American education address the relationship of schooling to social movements and organizing for change in society.

The history of what I have called "justice schools" shows that excluded groups embraced cooperative forms of education. Early Settlement House schools helped the immigrant working class adapt to America and engage in social reform. The movement for worker education and socialist schools demonstrated that learning could be directed to transform the labor process and remake the society. Later, black freedom and black power schools taught democratic rights and community control rooted in identity politics. The empowerment of the individual in female education and in community organizing also placed learning in a justice context. The curriculum in these schools tied learning to activism. While different schools expressed different visions, all held a commitment to use learning to advance a protest agenda. They faced common obstacles, including public attacks and government repression. Nonetheless, they established a legacy of engagement and commitment that can speak to contemporary school leaders interested in social justice.

Most adult justice schools were not created by existing school leaders but, instead, by social movement activists whose conception of education was directly tied to their transformative political work. These activists worked from the outside to structure environments that asked questions ignored by other educational leaders. It would be useful for contemporary educational leaders to consult with people in social movements to ascertain what issues and concerns disadvantaged groups are privileging to improve their lives. Educators may align directly with social movements to infuse their curriculums with what people at the grassroots want to learn. Outreach and bridge building to activist groups can bring new perspectives to existing educational institutions.

Notes

1. Susan Porter Benson (2007), Stephen Lassonde (2005).
2. See, for example, Jeannie Oakes (2005), Jonathan Kozol (1991), and E. Wayne Ross and Valerie Ooka Pang (2006).
3. Louise W. Knight (2005), John Dewey (1978), Lee Benson, Ira Harkavy, and John Puckett (2007).
4. Joy G. Dryfoos, Jane Quinn, and Carol Barkin (2005).
5. Fannia Cohn (1921).
6. Daniel Katz (2011).
7. Arthur Gleason (1921).
8. Eliot Wigginton (1991).

9. Richard J. Altenbaugh (1990).
10. Wigginton, ed., *Refuse to Stand Silently By*, 94.
11. Joyce L. Kornbluh and Mary Frederickson (1984).
12. SEIU 721, "Member Leadership Development Course Descriptions," http://www.seiu721.org/2010/01/member-leadership-development-course-des.php (accessed May 26, 2011).
13. United Auto Workers, "The Walter and Mary Reuther UAW Family Education Center," http://www.uaw.org/node/191 (accessed May 26, 2011).
14. UE Convention Resolutions, "Rank-and-File Education to Build a Strong and Effective Union," 2009–2011, http://www.ranknfile-ue.org/policy_ed.html (accessed May 28, 2011).
15. Liza Featherstone (2002), Nella Van Dyke, Marc Dixon, and Helen Carlon (2007), Mike Hall (2010).
16. Francis X. Gannon (1973), William J. Reese and Kenneth N. Teitelbaum (1983), Todd J. Pfannestiel (2003).
17. Pfannestiel, *Rethinking the Red Scare*, 77–99.
18. John Dewey (1933). The Rand School's records are housed at the Tamiment Library and Robert F. Wagner Labor Archives at New York University.
19. Quoted in Richard J. Altenbaugh, "Workers Education as Counter Hegemony: The Educational Process at Work People's College, 1907–1941," 6, http://www-distance.syr.edu/altenbaugh.html (accessed May 27, 2011).
20. Ibid., 6–7.
21. Ibid., 7.
22. Ibid., 8.
23. Elizabeth Gurley Flynn (1973).
24. William D. Haywood (1976).
25. Marvin E. Gettleman (2002, 2004).
26. *Jefferson School of Social Science v. Subversive Activities Control Board* 331 F.2d 76 (1963).
27. Christina Looper Baker (1996).
28. See John M. Glen (1996), Aldon D. Morris (1984).
29. Wigginton, ed., *Refuse to Stand Silently By*, 231.
30. Morris, *Origins of the Civil Rights Movement*, 145.
31. Ibid., 145–149, 236–239.
32. Knoxville, Tennessee, FBI office, "Highlander Folk School – Internal Security," April 4, 1941; FBI Director, "Highlander Folk School – Internal Security," June 29, 1961. The Highlander School FBI file is posted on the FBI's website, www.FBI.gov.
33. "Mrs. Roosevelt and Highlander," *Chattanooga News-Free Press*, April 21, 1958, http://www.pbs.org/wgbh/amex/eleanor/sfeature/fbi_hfs_01.html.
34. Tracy L. Steffes (2009).
35. Daniel Perlstein (2005).
36. Ibid., 38–39.
37. Jeffrey A. Raffel (1998).
38. Perlstein, "Minds Stayed on Freedom," 45.

39. Joy Ann Williamson (2005).
40. Perlstein, “Minds Stayed on Freedom,” 49.
41. Williamson, “Community Control with a Black Nationalist Twist,” 143–145.
42. Ibid., 148.
43. An excellent treatment is Ruth Rosen (2000).
44. Chicago Women’s Liberation Union (1971).
45. Ellen Willis (1992).
46. Susan Brownmiller (1999).
47. Virginia Smiley (1974), Stanley Aronowitz (2000).
48. Mev Miller and Kathleen P. King (2009).
49. Saul Alinsky (1946).
50. Aaron Schutz (2010).
51. For further information, see their web site, www.midwestacademy.com.
52. Two substantial works in this area are Joseph F. Kent (1994), and Harold W. Stubblefield and Patrick Keane (1994).
53. See, for example, Lassonde*, Learning to Forget*.
54. Joel Perlmann (1988), Ronald D. Cohen (1990).
55. David John Hogan (1985), Harvey Kantor and David Tyack (1982), Harvey Kantor (1988), William J. Reese (1986).
56. Michael B. Katz (1968), Paul Violas (1978), Joel Spring (1972), David Nasaw (1979), Samuel Bowles and Herbert Gintis (1976), Ira Katznelson and Margaret Weir (1985).

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Part V

Socio-cultural Representations of Social Injustices

Chapter 36
Moving Beyond the Injustices of the Schooled Healthy Body

Erin Cameron, Jan Oakley, Gerald Walton, Constance Russell, Lori Chambers, and Teresa Socha

Introduction

> We have bodies not just because we are born *into* bodies but because we *learn* our bodies, that is, we are taught how to think about our bodies and how to experience our bodies. (McLaren, 1991, p. 156)

In this chapter, we present and define the term the *schooled healthy body*, a concept that evokes the historical, social, political, and cultural contexts of Western education and reflects a growing number of policies, strategies, and responses to increased concerns and discourses of obesity and health crises within youth populations. We argue that the schooled healthy body is a site where regimes of discourse and power inscribe themselves in educational curricula and practices, especially in light of global obesity and health crises discourses. As schools, particularly through the subjects of health education and physical education, are increasingly seen as places to "fight the war against obesity," there is a need for critical theory and practice around how students learn about healthy bodies. In particular, there is a need for the concept of the schooled healthy body to be considered within a social justice lens in order to understand how bodies are privileged and oppressed and how this might be affecting the health of youth populations. One unique aspect of physical education is that no other subject requires students to undress, and even when dressed, students' bodies are on display. Thus, according to Kirk (2010), physical

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education contributes to the gender order of hierarchicalized bodies: muscular ones for boys (Kendall & Martino, 2006; Ryan, Morrison, & Ó Beaglaoich, 2010) and thin ones for girls (Kilbourne, 2000; Tiggemann, Gardiner, & Slater, 2000).

The schooled healthy body is worth exploring for two reasons. First, as schools are increasingly tasked with solving the health and obesity crises, educators and education bureaucrats have spent valuable resources developing programs and curricula to address growing health concerns. Unfortunately, this approach is not working (Leahy, 2009; McDermott, 2008; Rail, 2009; van Ingen & Halas, 2006). Worse, these programs and curricula are enacted on the bodies of youth in schools (Wright, 2009), projecting and privileging certain bodies while oppressing others (National Education Association [NEA], 1994; Weinstock & Krehbiel, 2009). The American sports world, in particular, perpetuates and benefits from this gender stereotyping and inequality (Messner, 2007).

Second, the right to an adequate "standard of living for health and well-being" (United Nations, 1948) is acknowledged in the Universal Declaration of Human Rights that was ratified in 1948. In other words, while all people have the right to adequate and nutritious food, shelter, access to education, and health care, they also have the right to live healthy and fulfilled lives.

Although the Supreme Court of Canada has been hesitant to endorse economic rights within the framework of the *Canadian Charter of Rights and Freedoms* (hereafter, the "Charter"), a growing body of legal literature critiques this failure (Iding, 2003; Kim & Piper, 2003; Murdoch, 2002; Petrykowski, 2003; Young, 2005). For instance, a law in the province of Quebec excluded citizens under 30 years of age from receiving the benefits of full social security, except when participating in employment programs. The rationale was to urge youth to seek work or go to school. Unemployed and under 30, Louise Gosselin unsuccessfully sued the government of Quebec for violation of equality and autonomy rights provided in the Charter. As Supreme Court Justice Arbour asserted in dissent in *Gosselin v. Quebec* (2002), "few would dispute that an advanced modern welfare state like Canada has a positive moral obligation to protect the life, liberty and security of its citizens" (Donovan, 2008). A purposeful interpretation of the Charter and the decision in *Gosselin v. Quebec* imposes upon Canadians an obligation to explore opportunities to benefit their own health and well-being. We draw from this case to argue that such obligation should be matched by the right to health education that is not discriminatory so that people can live with and in their bodies in better health. Moreover, it is acknowledged that "discrimination based on weight is so widespread in our society that many people take it for granted" and that "derogatory comments about heavier people are commonplace" and "members of this group also experience significant disadvantage in many areas of life, including health, housing, education, and the workplace" (Luther, 2010, p. 168). Although schools are mandated to treat all children equally and with dignity, discrimination based on weight is reinforced, not challenged, by "schooled healthy body" discourses and regimes of discipline.

Also consider the following story. During the 2010 school year, two Canadian post-secondary students failed mandatory school fitness tests, a prerequisite for graduation and university admittance. The fitness test, which was a cardiorespiratory test that measured students' heart rates after vigorous activity, was worth 50 % of their physical education mark. Failing the test, the students took legal action, claiming that it violated the Charter by undermining their active lifestyles and academic pursuits. They argued that the test did not account for individual variability or holistic health indicators. In a media interview, a school spokeswoman responded by saying that the goal of the test is to give students a "healthy mind in a healthy body" (Jerema, 2010, para. 2). The markers of a "healthy body" tend to be narrowly defined in Western societies; however, and in this instance, these narrow markers resulted in the students not only being framed as unhealthy but also having to endure serious academic consequences given their graduation and admittance to university were tied to their heart rates.

While some might argue that fitness testing is in keeping with educational trends toward standardized testing, we argue that the schooled healthy body is deeply problematic and undermines the reality that bodies in schools, as in society, are of diverse shapes and sizes. We also argue that within this discourse, the healthy body has become synonymous with a "fit," thin (especially for girls), strong (especially for boys), trainable, and able body, thereby marginalizing all other body types. To marginalize is to construe something as unimportant. In his book *Stigma: Notes on the Management of Spoiled Identity* (1963), Goffman identifies three realms of stigma, two of which are "abominations of the body," and "blemishes of individual character perceived as weak will [and] domineering or unnatural passions" (p. 4). We suggest that bodies "read" as nonnormative reflect both of these forms of stigma.

Given the increasing health concerns of youth populations, critically exploring the schooled healthy body is timely and of utmost importance. While some critical discussions are taking place in the fields of women's studies, health promotion, and physical education, a critical lens toward the schooled healthy body needs to be cast more broadly within social justice and educational research. It is our hope that our focus on embodied social injustices in schools, in particular within health and physical education, will not only generate awareness for and about constructed notions of the healthy body but will also contribute to the growing body of research that suggests "bodies matter in schooling" (Corrigan, 1988, p. 153) and that every child (of every size) matters (Burgard, 2009; Cale & Harris, 2011).

In this chapter, we draw on critical and social theorists, informed by "post" approaches to the body. By their very nature, "post" perspectives, such as poststructuralism and postmodernism, challenge taken-for-granted ways of thinking and open up spaces for new ways of knowing and being in the world. They help to provide a platform through which to critique existing knowledge and power dynamics and to identify injustices within a field (McLaren, 2003). Until recently, body-related educational research has been characterized by a Western reductionist view that has continued to separate mind from body and has treated the body as machine (Laker, 2003). With such reliance on Western dualistic ideology, there has been a notable absence of "post" perspectives (Andrews, 2008; Fernandez-Balboa, 1997; Laker, 2003; Lawson, 2009). While some research has employed "post" perspectives in the field of health and physical education (e.g., Cliff, 2011; Fitzpatrick, 2011a, 2011b, 2013; Petherick, 2011; Pringle & Pringle, 2012; Shea & Beausoleil, 2012; Webb, Quennerstedt, & Öhman, 2008), there is a need for more.

For this work, we draw from Monchinski's (2007, 2008) work on structures of dehumanization and Foucault's (1984) concept of "biopower"—the idea that individuals and populations are controlled through practices associated with the body. Biopower is a form of invasive and omnipresent health governance and regulation of peoples' lives through body practices that are predominantly classed, racialized, and gendered. We use Bourdieu's (1986) ideas of embodied capital to illustrate how schools reinforce ideas of "good" and/or "bad" bodies, which hearkens back to Goffman's (1963) conceptualization of stigma; capital and power are given to students who demonstrate their "goodness" through being "trim, tight, lineless, bulgeless, and sagless" (Bordo, 2003, p. 32). In a context of widespread panic about rates of childhood "obesity," schools have been identified as sites for active intervention, "as most children and youth spend a substantial amount of time in schools—controlled environments that are subject to extensive government regulation" (Ries & von Tigerstrom, 2011, p. 363). Educators, in particular those in health and physical education, need to question how the bodies of youth are turned into political sites of privilege and oppression through bodily evaluation, monitoring, and surveillance practices. With an increased agenda of high standards and measurement, bodies will continue to be sites of punishment and privilege through such scrutiny, and many youth will continue to suffer from these injustices. Hence, there is a need to explore how schools and physical education courses are (and are not) engaging students in meaning-making practices about their bodies, from the perspective of both physical and social construction.

To do so, we first provide a historical context of physical education in Western societies and its role in establishing the schooled healthy body and how the body is increasingly used as a structure of dehumanization (Monchinski, 2007). We illustrate how health education is increasingly collapsed into physical education and how this contributes to social injustices enacted on the body. We then explore the current context of Western schools and the dominant biopedagogies being learned by students. Biopedagogies refer to both biopower, which frames the body as a site of regulatory power, and pedagogy (Wright, 2009).[1] We offer a discussion of why bodies have variably become privileged and oppressed in schools and physical education and how we need to disrupt this embodied social injustice. We end with a discussion of places and spaces that create opportunities for reimagining embodied education. Although the context of this particular story is Western, the themes are relevant for discourses of social justice in non-Western societies, as well. Moreover, globalization of Western-based products, media, and advertising is increasingly ensuring that Western bodily ideals that are critiqued here, and enforced via the schooled healthy body, are being exported to non-Western societies.

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[1] Biopower was coined by Foucault (1979), as having power over bodies whereby the body becomes the object of political power. Hence, biopedagogies are pedagogies that regulate the body.

Evans and colleagues use the term body pedagogies, which defines whose and what bodies have status and value. Hence in obesity discourse, an individual's character and value is judged by their weight and size (Evans et al., 2008).

History of Physical Education in Western Society

During the seventeenth and eighteenth centuries, rationalism and the Scientific Revolution gave shape to ideologies of mind/body separation and the body as machine. This idea of the body as a trainable tool inspired educators, in particular German Johann Friedrich GutsMuths (1749–1839), who is regarded by some as the "grandfather" of modern physical education (Phillips & Roper, 2006). GutsMuths is recognized for advocating physical education's potential positive influence on military power and thus its ability to lead Germany to unity and freedom from French control. This inspired many societies around the world, in particular those in the West, to follow suit and use physical education to develop military masculinity, drive paternalistic control, and build disciplined, orderly, and fit bodies (Wamsley, 1999). The perceived need to intensify the physical training and strength of men was also deeply linked to imperialism and the "need" to control women and non-Anglo-Saxon, nonwhite peoples around the world.

In the nineteenth century, physical education took on a new role; it was not only a site for the training of fit bodies, it also became a site for medicine and psychology to enact their political will and ideas of health. Before the late 1800s, health had been considered the opposite of sickness (Donatelle, Davis, Munroe, Munroe, & Casselman, 2004). As deadly epidemics spread throughout society, scientists discovered that all people were susceptible to contracting epidemic diseases unless they took sanitary precautions, which gave rise to a focus on sanitation (Valverde, 1991). Thus, physical education became seen as a site to promote health by promoting sanitary practices and healthy lifestyle activities (Van Dalen & Bennett, 1953).

At the same time, while physical education became a political vehicle for the military and medicine, physical activity was argued as a necessary response to increasing urbanization. Lawson (1998) identifies the period between 1880 and 1930 as the period during which physical activity became institutionalized through physical education for health reasons. He argues that while politicians, educators, and health promoters advocated for physical activity with the intent to improve health and well-being, physical education also promoted physical ability as a form of physical supremacy. The disciplined body demanded by physical education supported the emerging Western ideals of "perfect men" and "perfect women" that went hand in hand with the fit, muscular, military body and the faultless, clean, sanitary body. Even to this day, physical inactivity continues to be positioned as a primary determinant of obesity, and activity is positioned as a key strategy of health governance, despite lacking sound scientific foundation (Botterill, 2006; Brownell, 2005; Brownell & Warner, 2009; Burgard, 2009; Gard, 2010; Gard & Wright, 2005; McDermott, 2008; Rail, 2009; Rawlins, 2008; Rimm & Rimm, 2004; Wann, 2009). The combined physical (in)activity and obesity discourses have created a favorable environment in which to construct a health crisis that is conveyed through experts and represented as "truth."

Thus far, we have discussed the historical significance of physical education as military training, physical education as sanitation, and physical education as physical activity. One remaining influence to explore, one which remains dominant, is physical education as public health, which has become the site of the new public health discourse.

Health discourses have evolved in problematic ways over the last 30 years. In 1986, at the first global conference on health, a "new public health" was established (Catford, 2007). The Ottawa Charter for Health Promotion, an international charter organized by the World Health Organization in 1986, recognized that "health is created in the context of everyday life: where people live, love, work, and play" (Kickbusch, 2007, p. 9). Guiding this new public health approach were five key strategies to increase global health: build public policy around health, create supportive environments, strengthen community action, develop personal skills, and reorient health services.

While some have argued that the Ottawa Charter has yet to be utilized to its fullest potential (Kickbusch, 2007), we argue that it nonetheless has had two profound impacts on education. First, the Ottawa Charter gave rise to what is now known as health-promoting schools. According to the World Health Organization (1996), a health-promoting school is a school that "is constantly strengthening its capacity to be a health setting for living, learning, and working" and that aims "to build healthy public policies, create supportive environments, strengthen action, foster the development of personal skills, and reorient health services to embrace health promotion" (p. 19). Second, the focus on personal skills gave way to public discourses in schools around health and bodies that were more prescribed about how to live than ever before (Tinning & Glasby, 2002). Health curricula like "avoid fat," "stop smoking," "get fit," and "practice safe sex," focused on how risk factors could be navigated by individuals and how an awareness of the risk factors would help individuals adopt more "healthy" lifestyles. Arguably, this turned health into a regime of power and knowledge, oriented to the regulation and control of bodies by the state and by self-regulation (Foucault, 1984). In other words, power and capital were gained and/or lost by demonstrating obedience to prescribed Western notions of health. What this "new public health" approach ostensibly ignored were the different worldviews and the different social, political, and cultural contexts of youth. Just like in the early 1900s, when physical education was based on militaristic consumerism, in the 1990s it became based on health consumerism.

Through a historical lens, it is not difficult to see that physical education has been, and continues to be, dictated by political agendas, policies, and strategies. Furthermore, a lack of critical and theoretical grounding in physical education (Fernandez-Balboa, 1995; Kirk, 2006; Lawson, 2009) continues to nurture master narratives derived from privileged, white, elite, Christian, Western worldviews that exult the continual progress of science and technology, industrialization, and human domination (Fernandez-Balboa, 1997). These master narratives are imposed as hegemonic and totalizing discourses that dictate the conceptualizations and markers of physical health. For example, "fit," able-bodied, and slim bodies of girls and muscular bodies of boys are positioned as healthy, desirable, and the result of individual effort, while "undesirable" bodies are equated with lack of moral fiber, laziness, and lack of effort. This is legitimized through a biomedical model where weight, height, body mass index, cardiovascular health, cholesterol levels, and other scientifically and medically measured health indicators are seen as the total factors in determining a person's overall health. It is also legitimized through educational systems when these master narratives are promoted as taken-for-granted "truths" about the body.

Despite these troublesome narratives, McCuaig and Tinning (2010) argue that a unique aspect of physical education is that, "unlike its fellow disciplines, health and physical education is charged explicitly with the task of producing productive and healthy bodies through the training of apprentice citizens in the arts of healthy living" (p. 57). While this could be interpreted negatively, they position it as a positive and dominant function of health and physical education—to provide solutions to problems surrounding the body in a time of heightened concern regarding the sexualization and domination of and over the body. Perhaps McCuaig and Tinning have a point: if physical education ceased to exist, there would no longer be a school subject that balanced out the dominant "mind" preoccupation in education. Nonetheless, we also argue that physical education as curriculum and practice is part of the problem.

Since health is often collapsed into physical education, it inevitably falls victim to the historical contexts of physical education. For example, while students tend to have a sophisticated ability to be critical of dominant health discourses in the media, they typically do not apply the same critical lens in health and physical education environments (Millington & Wilson, 2010). In other words, within a physical education culture, dominant discourses are often normalized and accepted. This is concerning, especially in the context of what Petherick (2011) calls the biocitizen:

> HPE [health and physical education] becomes a site for the dissemination of ideologies pertaining to lifelong health goals…(bio)pedagogies of HPE involve more than learning practices of health but, I argue, also incite particular modes of subjectification where students perform various practices of the self in becoming (or failing to become) good, self-governing biocitizens. (p. 14)

Biopower and Pedagogy

A "biocitizen" is defined as someone who consciously or unconsciously looks after their health, not just for their own benefit but also for the benefit of the community and state (Halse, 2009). The term highlights the fact that "health" has become less about living well and more about control and external markers of a "good civic subject" (Petherick, 2011, p. 4). In this case, schools and gymnasiums are sites where biocitizenship is taught. For example, in physical education classes, fitness testing and sports drills are often used to evaluate students' health, fitness, and ableness. However, they do much more than that. These types of tests introduce binaries such as "fit" and "unfit," "healthy" and "unhealthy," and reinforce ideas of a "good" and "bad" biocitizen (Petherick). In other words, students who perform well and demonstrate control of the body, and mastery of fitness and sport skills, are considered good biocitizens without actually being labeled as such. Within these boundaries, students quickly learn that while certain classed, raced, gendered, and sexed body types are privileged and celebrated, others are punished and demonized (Andrews, 2008) as well as stigmatized in relation to physical difference (Goffman, 1963).

Indeed, children and youth are plagued with anxieties about their bodies, and "fat" children are routinely ostracized and bullied, within physical education classes and in schools generally (Geier et al., 2007; NEA, 1994; Rimm & Rimm, 2004; Sjoberg, Nilsson, & Leppert, 2005; Wann, 2009; Weinstock & Krehbiel, 2009). Further, for boys and men, privileged bodies—that is, the muscular ones—are seen as hegemonically dominant over girls' and women's bodies as well as other men (Connell, 2007, 2009). Within physical education cultures in schools, masculine and muscular boys are typically rewarded with attention and elite places on sports teams, but boys who are not competitive and aggressive, as signified and interpreted through their bodies, usually face hostility and derision. Thus, the focus on muscularity for boys in physical education reinforces sexism and homophobia in society (Frank, 1996; Walton & Potvin, 2009).

For girls and women, the focus is not on muscularity but on thinness, not only as representative of Western commodified ideals of beauty but also as a physical marker of submission (Kilbourne, 2000; Tiggemann, Gardiner, & Slater, 2000) and a discursive strategy to "normalize" thin bodies by contrast against other bodies (Taylor, 2011). Bodies that are not thin are stigmatized in Western societies, which is why bullying girls through epithets such as "fat" or "cow," regardless of their actual body size, is such a powerful tool in the arsenal of verbal violence. For boys and girls, then, media-driven gender norms are literally embodied and performed as though "natural" and "normal."

The making and marketing of bodies has become a highly profitable practice that some schools promote. Physical education (which could more aptly be called physical education as sport skills) within schools is highly susceptible to political and corporate pressures and is already on the path toward a future of privatization, commercialization, and corporatization (Kirk, 2010). For example, a current trend is for physical education programs to be owned by private fitness companies whose bottom line is driven by profit, not student-centeredness, or even physical fitness (Kirk).

Over the last decade, a flurry of scientific literature and media around obesity and inactivity has emerged (Gard & Wright, 2005). The latter has generated a thriving health and fitness sector (Maguire, 2008). Combined, science and advertising media have fueled an "obesity crisis" that positions inactivity and poor nutritional habits as solely the problem of individuals' poor lifestyle choices. As a result, it has led to a proliferation of policies, educational curricula, and health initiatives around the world to combat and prevent obesity through social regulation and neoliberal individualism (Burrows & Wright, 2007). While health research illustrates that all major health determinants are social (Raphael, 2009), the messages of individualism have prevailed and fueled the development of the schooled healthy body, an icon of biopower and pedagogy in schools and physical education. Arguably, until we can start addressing the major determinants of health, we will not solve any "health crises" (Evans, Davies, & Rich, 2008).

A growing number of researchers challenge the obesity epidemic and the "obesity crisis" discourse (Brownell, 2005; Brownell & Warner, 2009; Campos, Saguy, Ernsberger, Oliver, & Gaesser, 2006; Evans, 2003; Evans et al., 2008; Gard & Wright, 2005; Rail, 2009; Rawlins, 2008; Rothblum & Solovay, 2009; Wann, 2009). As McDermott (2008) argues, the obesity crisis discourse is a "central technology of health governance" (p. 5). Fernandez-Balboa and Muros (2006) further assert that the crisis "is artificially created through the media, schooling, and other forms of institutional socialization that condition and conform our everyday living" (p. 197) and that we learn to "naively accept it as normal and natural" (p. 197). It is this created reality, otherwise known as hegemony or ideological domination, that Gramsci (1971) argued controls the masses and enables injustice and oppression.

These dominant discourses ("it's up to you," "save the child," and "obesity crisis") have huge effects on how bodies are produced and controlled in society and schools. Foucault (1979) theorized the regulation of the body and the role of the body in formations of power and knowledge and called it governmentality. Halas and Hanson (2001) have drawn upon Foucault's ideas, arguing that "it is through governmentality that the state reproduces itself via disciplines (education) whose discursive practices reach the capillary level in individuals in their workplace, schools, and home, ensuring that, as stated, a populace of docile, practical bodies is maintained" (p. 122). They argue that schools have long managed and regulated students' movements by keeping them indoors in classrooms and out of the hallways, having them sit quietly, pay attention, speak in turn, and line up to move from one location to the next. In other words, "the oppression of young people is often masked in the disabling categories constructed to keep kids who have experienced emotional and behavioral problems under control" (Halas & Hanson, p. 125). Social problems, then, are often reframed as individual problems. Through such individualization, individuals are blamed for the very problems that are created through social and economic discourses. Such a focus derives from Western ideology of the individual and contributes to the construction of the schooled healthy body.

Humans, individually and collectively, are shaped by social, political, and cultural ideologies and are influenced to think and act in certain ways. In Western school systems, students learn to privilege the mind for its intellect and to reduce the body to a machine that is controllable, manageable, and trainable. Most children are not taught to question the daily schedule or question why we sit to learn, why "real" learning only happens indoors, or why they learn certain subjects and not others. In other words, students, as young citizens, are not taught to question ideologies or to think critically, despite rhetoric to the contrary (DiAngelo & Sensoy, 2009). Ideology is "a set of generalized and common beliefs that make people act as if the circumstances and contexts of their lives were natural" (Fernandez-Balboa & Muros, 2006, p. 198). In Western societies, there are certain vehicles through which dominant ideologies are perpetuated and disseminated, such as advertising, public relations media, and schools, which often model how people should feel, act, dress, walk, talk, and socialize.

In schools, students are socialized to hierarchies and schedules. They are embedded in school structures where "the stratified and hierarchical relations of power are so prevalent, so much a part of their daily functioning that [they] are seldom questioned" (Fernandez-Balboa & Muros, 2006, p. 199). However, Dewey (1916) argued that perhaps the greatest of all pedagogical fallacies is the notion that a person learns only the particular thing she or he is studying at the time. In other words, as the mind learns to read, write, and do math, the body learns to sit and obey. Even in physical education, where the focus is on the body, the common threads throughout its history as a subject in schools have been power, control, and obedience. Policies in many jurisdictions outline daily amounts of time that schools should dedicate toward physical activity, but one must acknowledge that the majority of the day is used for instructional time where students sit to learn. As Halas and Kentel (2008) point out, rarely do we "consider how painful it can be when we hold young people back from the movement their bodies crave, particularly in schools" (p. 214). Such practices are counterintuitive for children as they learn to not move, and they reinforce a Western ideology that privileges the mind over the body.

Another dominant ideology that pervades Western school systems is what Althusser (1971) called "technocratic rationality," which is the combined influence of institutionalization and corporatization that looks at means, facts, calculations, and measurements, rather than values and sentiments. Put another way, it "turns [humans] into objects to be counted, labeled, classified, and disposed of, according to externally-imposed standards and principles" (Fernandez-Balboa & Muros, 2006, p. 199). Technocratic rationality works under the guise of standardization, specialization, synchronization, centralization, maximization, and concentration. It controls not only school content but also student bodies. It tells them when to move and when to sit still. Within Western cultures that privilege the fit, thin, strong, trainable, able body, there is an increasing need to critically examine the hegemonic truths of, about, and over the body.

While critical theories such as critical pedagogy address the injustices of race, gender, class, and sexuality, there is less emphasis on embodied injustices. By embodiment, we mean the ways that acknowledge and understand that bodies are not just physical entities but also psycho-emotional entities. This goes beyond Descartes' famous saying, "I think, therefore I am," and acknowledges the fact that the very act of thinking is an action that is embodied. The famous sculpture *The Thinker*, by Auguste Rodin, is a case in point. The figure is positioned in the act of thinking, although as viewers, we could not possibly know his thoughts. His body clearly demonstrates that he is thinking, even to those who do not know the title of the work.

Toward a Vision of Embodied Justice

Many scholars have argued that schools and physical education are dominated by Western ideology (Andrews, 2008; Fernandez-Balboa, 1997; Laker, 2003; Lawson, 2009) that separates mind from body and fails to address social inequality or foster social justice (Tinning, 1991). This is not to suggest there have not been scholars working from a sociocultural perspective and applying these ideas to physical education. Critical pedagogy, which derives from the idea of education for social justice, endeavors to transform oppressive conditions and make the invisible visible. It emerged in educational literature in the 1970s and has been gaining strength ever since, to the point of some tenets being taken for granted (Kincheloe, 2008). Its impact on physical education occurred a little later, but then it eventually became a revolt against growing developments in physical culture, namely, the commercialization, commodification, and technologization of sport, exercise, and the body (Kirk, 1999).

Critical pedagogy has been criticized for being idealistic, for foisting its moral values on others (Gore, 1993; O'Sullivan, Siedentop, & Locke, 1992), and for its lack of attention to practical applications (Breunig, 2006). While Fernandez-Balboa (1998, 2009) agrees that much of this criticism is warranted, he also argues that critical pedagogy provides a way to be less a master of truth and justice and more a creator of a space where people can think about their own thinking and care for, and be attentive to, others. He advocates for a pedagogical perspective in physical education that works toward the development of ethics and the care of self (Sicilia-Camacho & Fernandez-Balboa, 2009).

As educators who teach from critical pedagogical perspectives, we have all been struck at one time or another by the overt resistance by students in our courses and by other educational researchers to engage with the notion of the "healthy body" as a social justice issue. Yet in our teaching, we have found that many students remember their physical education experiences as negative and derived from frameworks predicated upon competition and the shaming of "unfit" bodies. Many of our students, like so many others (Guthman, 2009; Hetrick & Attig, 2009; Wann, 2009; Weinstock & Krehbiel, 2009), have internalized this experience as their own individual problem and appear to be unaware of the larger systemic issues at play, that is, how their beliefs, values, and attitudes are driven by cultural lenses and a Western ideology about the body (Giroux, 1992). As such, the need for inclusive and culturally affirming physical education is increasingly imperative (Flory & McCaughtry, 2011; Halas, 2011).

Our hope is to encourage educators and scholars to think about the discriminatory spaces within physical education and schools as a way to start working toward creating democratic and liberatory spaces in schools for *all* bodies and *all* human beings. We are extremely concerned by both the lack of critical awareness of the schooled healthy body and the growing role of physical education in the moral and ethical education of young people and their bodies (Rail, 2009). This reform will not be easy, as evidenced through Kirk's work involving physical education "futures" (Kirk, 2010), in which he struggled to identify solutions to disrupt the current injustices perpetrated on the body. We do not profess to have all the answers, nor do we believe there is one way to go about such work. However, we would like to highlight two examples of critical and noteworthy progress as they demonstrate a shift from traditional technocratic and unjust physical education to socially just physical education.

Our first example is from the work of Jane Addams. Addams, an activist and educator, used the playground in a different way than most in that she used playground physical activity as a tool for recognizing differences and empowering people through festivities, games, and democratic play. According to Azzarito, Munro, and Solmon (2004) in their discussion of the implications of her ideas, to Addams, playgrounds are "spaces that embodied education and social democratic discourses that not only recognized but also emphasized the formation of the community, and the intersubjectivity of the individual and society through democratic play" (p. 391).

A second example draws from the success of the New Zealand Ministry of Education in putting critical pedagogy into policy. In 2000, the Ministry completely revised their physical education curriculum to address the dominant reductionist view by mandating a critical pedagogy perspective (Culpan & Bruce, 2007). Their new curriculum focuses on the movement culture (learning in, through, and about movement and taking into account the physical, social, spiritual, and mental and emotional aspects of well-being), the holistic nature of health, the functions and influence of movement (from both an individual and a societal perspective), the contexts of movement (scientific, physical, social, economic, ethical, and political), and the promotion of an inquiry-based, reflective teaching style. While there have been challenges and setbacks with implementing this new curriculum, Culpan and Bruce argue that "not to engage in such attempts may well bring an end to physical education" (p. 9).

While these and other examples demonstrate the potential of more critical perspectives in physical education (Fitzpatrick, 2010), this approach remains on the fringes of the physical education literature and is often dismissed as "radical" by positivistic and technocratic researchers in the field (Tinning, 2011). Nonetheless, what Addams, the New Zealand curriculum, and a growing number of scholars illustrate is that it *is* possible to disrupt dominant discourses around the schooled healthy body and engage in innovative, embodied learning. Not only do these ideas and practices challenge theoretical and pedagogical paradigms, they also challenge dominant practices enacted on young bodies every day.

Education can also look to The Boston Women's Health Book Collective that produced the landmark *Our Bodies, Ourselves* (OBOS), as a model to counteract the current (in)justices perpetrated on the schooled body. A self-help manual on women's bodies and health that also addresses the socio-political and economic factors that affect women's health, OBOS was first published in 1971, and in 1996, was listed by *Contemporary Sociology* as one of the ten most influential books for the past 25 years. Now in its 5th edition (The Boston Women's Health Book Collective, 2005), OBOS has been translated and/or adapted for women in more than 25 countries (Davis, 2007). Davis appropriately coins OBOS a feminist epistemological project and argues that it "validated women's embodied experiences as a resource for challenging medical dogmas about women's bodies and, consequently, as a strategy for personal and collective empowerment" (p. 2). A catalyst for the women's health movement, its impact has been far reaching. In the medical field, there has been a proliferation of women's clinics in major hospitals, birthing rooms, midwives, family participation in labor, and an increase in research funds for women's diseases. In academia, OBOS has led the way for the integration of the body into poststructuralist and socioconstructionist research perspectives (Gordon & Thorne, 1996).

As awareness of global social justice issues increase, our hope is that the body will not be forgotten. Darder, Baltodano, and Torres (2003) have argued that the goal of critical pedagogy is “to invigorate the capacity of radical educators to engage critically with the impact of capitalism and gendered, racialized, and homophobic relations on students from historically disenfranchised populations” (p. 2). We suggest this definition is still missing a key element: our bodies, and by extension, our “embodied” experiences.

Western ideology on schooled healthy bodies continues to inform current social institutions, including educational systems. Furthermore, the global breadth of media and advertising technologies impose Western, profit-driven ideals about bodies upon non-Western societies. It is thus imperative to continue asking questions about the culture of schools and physical education, how physical education marginalizes and privileges certain body types, and how schools and physical education pedagogy can provide safe and democratic spaces to unsettle the notion of the “schooled healthy body.” We must also continue to ask questions about how to disrupt the idea of a “health” binary through new pedagogical practices or approaches. In schools and in physical education, bodies are made and unmade, learned and unlearned, constructed and deconstructed. Physical education trains the body and schools manage it. Both play foundational roles in the construction of bodies through idealized lenses which privilege some at the expense of others, and both require ongoing interrogation if we are to achieve a holistic, embodied vision of social justice.

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Chapter 37
Social [In]Justices of Women as School Principals in Lebanon

Bassel Akar and Maha Mouchantaf

Introduction

The increasing number of women in senior management and government positions across the Arab world during the past two decades is testimony to the degree of progress of equal opportunities in the region. Still, anecdotes and the gradual increase of studies of women managers in the Arab region show the ongoing struggles of women's pursuits to develop as leaders in the workplace. Moreover, researchers suggest that the rising number of women entrepreneurs in the region is indicative of the marginalization of women or limited opportunities for access in the public and private organizations (International Labour Organisation, 2012). A paucity of women's educational leadership studies in the Arab region remains, showing the pressing need to examine the barriers that women experience when reaching and sustaining leadership roles in schools and universities. In this chapter, we explore social justice issues of 12 women school principals in Lebanon through reflections of their struggles and successes. We also examine the cultural variables of social justice of women leaders in related studies carried out in the region.

Perceptions and interpretations of inequalities and injustices of women's experiences in educational leadership have fundamentally been examined and framed by feminist theories. Indeed, feminist discourse on "deconstructive/reconstructive work in educational administration" has focused mainly on leadership and social justice examining the constructs underpinning issues of access, power relations among stakeholders, and the processes of promoting equity in society (Blackmore, 2006, p. 187). One of Blackmore's (ibid) illustrations is the socially gendered responsibility and capability of women as teachers (caretakers of children) and men as principals (leaders and decision-makers) during the emergence of Western

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liberalism. Feminist discourse has also pursued “equal but different” approaches in educational leadership. From a wider framework of citizenship, Lister (2003) illustrates the complexities and fragilities of consolidating the typical binary of promoting equality regardless of gender while ensuring provisions for women’s individual needs. For instance, the scholarship of “equal but different” has often resulted in highlighting differences in leadership styles, which have overshadowed the discourse on women’s abilities and skills as key factors that significantly contribute to managerial change (Blackmore, 1996). We are, therefore, conscious of women’s individual constructs of social justice; whether fairness is primarily derived from addressing individual needs, ensuring equal male-female treatment, or some consolidation of the two.

The range of subtle and blatant injustices of women becoming and working as leaders in education administration is exhaustive. Equally, examining these injustices have involved an array of approaches including deconstructing/reconstructing concepts and investigating sociocultural beliefs and practices. In this study, we draw on a framework of social justice that focuses on access and development when exploring the barriers and opportunities of being a woman school principal in Lebanon.

Women leaders accessing senior positions, carrying out leadership roles, and developing professional skills raise issues of equality and social justice. Social justice in the labor market, according to Dana and Bourisaw (2006), transpires when women and men have the same opportunities for work and access to promotion, quality training, and higher executive positions. Furthermore, they maintain that these opportunities, however, are impeded by gender (specifically, being a woman), ethnicity, and sex-role stereotypes. For instance, socially constructed stereotypes typically construct women as homemakers and family caretakers, which manifest into cultural norms where male partners do not share domestic responsibilities and women make career commitments once the children become self-sufficient.

Review of the Literature

The following literature review will uncover various dimensions that construct barriers commonly shared by women leaders in the Arab world including the single study in the region found, to date, on Arab women principals. The issues emerging out of women’s experiences construct a conceptual framework of access, work-home balance, and professional development for exploring similar experiences among women principals in Lebanon.

Two Studies on Women Principals

In the field of education, we found only two research articles on women principals in the Arab region through an extensive search in various online databases including EBSCO, PsychInfo, ERIC, ScienceDirect, ProQuest, and Shamaa, an online database for studies in the Arab region. One of the studies (Khleifat & Al Matārina, 2010) comprised a sample of 331 public school principals ($n = 170$ females) in the southern region of Jordan investigating job stress levels. They found among the principals that not finding the time to participate in professional development activities was the most stressful factor. Gender differences, however, showed that women principals experience significantly higher levels of stress due to efforts of fulfilling responsibilities at home and at work, which "affects the performance of their work" (p. 633).

In nearby Palestine, Arar and Abu-Rabia-Queder (2011) investigated the journeys of two Palestinian Arab women principals, each married with four children, by exploring their childhood ambitions, access to the job, and significant moments during the position. Through unstructured interviews, the two participants spoke of their professional and personal life stories followed by a set of semi-structured interviews inquiring into challenges of being principals and approaches taken to address those challenges. Both faced social and political barriers as women in a patriarchal society and Palestinian Arab minorities in Israel. They confronted resistances from society to taking leadership positions by being assertive and reassuring themselves of their abilities to fulfill their professional desires. They also reflected on their authoritative and highly structured approaches during their initial years as principals and the gradual balance with an empathetic approach to leadership with time. Arar and Abu-Rabia-Queder's study is unique to the following literature through its unstructured interviews, which allowed for the findings of transformational approaches to leadership and evidence to suggest personality as a key factor in overcoming social and political barriers. Their identified barriers and experiences are shared among the levels of injustices found in the following literature reviews on women in management positions in the region.

An Overview of Studies on Women Managers in the Arab Region

Albeit the paucity of research on women managers in the Arab region, two literature reviews conducted show various research trends and outline the extent to which cultural dimensions and their manifestations hinder women's opportunities in the managerial arena. In a meta-analysis of literature on women managers in the Arab world dated to 2006, Omair (2008) examined 20 articles, from which 18 were empirical studies (12 quantitative and 6 qualitative). The studies were conducted in Egypt, Kuwait, Qatar, Bahrain, Lebanon, the UAE, Saudi Arabia, and Oman. From the publication dates – 1980s (1 article), 1990s (6 articles), and 2000–2006 (13 articles) – Omair noted a rising trend in the interest of researching women managers and leaders in the Arab region. Omair also draws on the studies to outline six emerging themes related to women becoming or developing as workers and managers in the Arab world (see Table 37.1).

The second literature review was conducted by Karam and Afiouni (2011) whose comprehensive search for studies focused on women leaders in the Arab world.

Table 37.1 Omair's (2008) review of literature (1980–2006) on women and work in Arab context

Emerging themes	Examples from case studies
Career barriers	Women in the Kuwait civil service feel their access to top-level positions in the government sector is blocked (Metle, 2002). Women in Lebanon face sociocultural barriers such as expectations to raise a family (Jamali, Sidani, & Safiedine, 2005)
Attitudes towards women who work	University students in Egypt hold conservative views towards women who work (Mostafa, 2003). Findings from a study in the UAE indicated a slight shift in attitudes from traditional to more liberal (Mostafa, 2005)
Driving forces for success	In Oman, women's successes were attributed to family support, opportunities to access work and professional development, and more personality-related factors such as self-confidence, determination, and perseverance (Al-Lamki, 1999)
Work-life balance	In Lebanon, women at work expressed little or no support through job sharing and childcare (Jamali et al., 2005), while women in Oman showed contentment about access to child-care centers and affordable live-in domestic workers (Al-Lamki, 1999). In Kuwait, women claimed to having at least two live-in helpers (Shah & Al-Qudsi, 1990)
Reasons for working and role models	Women in Oman (McElwee & Al-Riyami, 2003) and Saudi Arabia (Alajmi, 2001) have been found to work for more personal reasons than economic gain. Alajmi suspects that these women may be protecting their husbands' dignity as main providers of the household
Cultural factors affecting women's working lives	Arab traditions steer girls more towards expected domestic roles (Alajmi, 2001) and value boys more as greater financial investments (El-Ghannam, 2002). Although Islamic traditions have shaped the patriarchal social order in the Arab world, the gender inequalities are primarily due to men's interpretations of Islam rather than Islam itself (Metle, 2002)

Their search resulted in categorizing empirical studies into three areas of focus: (1) women managers in the banking and management sectors, (2) access into the labor market, and (3) the balance between work and family (see Table 37.2).

In the subsequent analysis, we examine the findings of these studies and expand on the framework of accessing leadership roles, working at the workplace, and managing home and work responsibilities.

Accessing Work

The obstacles that women in the Arab world experience when attaining work largely stem from sociocultural norms, which construct women's roles of raising a family, promote the dominant male status of husbands and foster a sense of fear of breaking social norms. In interviews with ten female entrepreneurs in Lebanon, some recalled objections from sisters, cousins, and husbands arguing that work would mean time away from the family (Jamali, 2009). Objections also came from the family's fear

Table 37.2 Studies Karam and Aflouni (2011) found on women leaders in the Arab region

Focus on women in the banking and management sectors
Al-Lamky (2007), Jamali (2009), Jamali, Safieddine, and Daouk (2006), Jamali, Sidani, and Kobeissi (2008), Jamali et al. (2005), Marmenout (2009), Metcalfe (2006, 2007), Omair (2008), Tlaiss and Kauser (2010)
Focus on women's entry into labor force
Assaad and Arntz (2005), Khreisat (2009), Miles (2002), Nasser and Abouchedid (2003)
Focus on women's day-to-day balances between home and work
Farahat (2009), Omair (2010), Vidyasagar and Rea (2004)

of compromising the alpha status of the husband. Women in Lebanon (Jamali, 2009) and Jordan (Miles, 2002) seeking work faced objections from their fathers, husbands, and families who feared that society would consider the husband incapable of supporting the family. Al-Lamky (2007) supposes that women earning a substantial income may bring about a fear that men could be assuming feminine roles. As a result, to consciously preserve a modest position and salary in relation to the husband, one woman in the UAE rejected a promotion (Marmenout, 2009). Besides the attention taken from the family and the caution of undermining the alpha male, a study in Saudi Arabia (Vidyasagar & Rea, 2004) unveiled objections that came from husbands who did not want their wives to mix with other men in the workplace.

Some women leaders, too, appear to reinforce the constructions of gender roles. In a workshop in the UAE, one voiced that she wanted her sons to marry women who would not work to ensure the raising of a healthy family (Marmenout, 2009). Showing similar conservative views, attitudes of 172 females working in corporate business in Turkey agreed more than the male participants ($n = 146$) that "The place of a woman is near her husband and being a good mother" (Aycan, 2004, p. 460). Thus, socially constructed traditional gender roles that women value is a primary and delicate variable when interpreting social [in]justices of women becoming managers in education.

State legislation has also determined the fate of women's work opportunities. By conserving traditional patriarchic values of control, a law in Saudi Arabia forbids women work or travel overseas without a *mahram*, or male chaperone (usually relative). Interviews with 28 female doctors in Saudi Arabia described the complexities and limitations of specialization overseas due to finding and financing a *mahram*, which some resolved through marriage or moving the entire family (Vidyasagar & Rea, 2004). In Jordan, women reported that since the law prohibits them from working night shifts, "factories prefer male workers" (Miles, 2002, p. 421). These women also believed that they do not get hired because of employers' fears of women leaving work once they get married or for maternity leaves stipulated in labor laws (Miles). While legislature has tried to support women managing between work and home, maternity leaves granted to women indeed reinforce gender discrimination so long as men are excluded.

Deep-rooted social norms and expectations have had some significant influence on women's areas of study and job attainment. Nasser and Abouchedid (2003) found “no direct relation” between “high educational levels of female university graduates” in Lebanon “with their occupational attainment” (p. 335). Hence, the authors maintained that the jobs that women get in Lebanon are influenced by the parents’ need to increase social status. They also found the field of study to be a good predictor. Females concentrate in the humanities, which are “traditionally demarcated as feminine” and “naturally lower paying occupations in Lebanon” (ibid, p. 336). Moreover, Nasser and Abouchedid (ibid) connected the scholastic areas of study to findings they conducted several years prior (Abouchedid & Nasser, 1999) that showed discrimination in the enrollment of males and females in majors, reinforcing gendered areas of specialization.

The limitations of accessing jobs have also been more direct through discriminatory selection processes, which have negatively impacted the economics of wages for women. A 10-year study (1988–1998) in Egypt found, in the private sector, “a pattern of defeminization” of jobs and a significant increase in the gender differential of wages with women earning less than men (Assaad & Arntz, 2005, p. 441). Assaad and Arntz (ibid) argue that the increase in wage gap is most likely due to gender discrimination or other barriers at the entry level where the defeminization of certain jobs have resulted in “overcrowding” of the female job market and, therefore, has “depressed wages” (p. 444). Another case of direct discrimination during selection was reported in Jordan by women being discriminated against because of wearing the *hijab*, or head scarf, when applying for teller or administrative positions in the banking sector (Miles, 2002).

The facilitation of employment through connections, or *wasta*, is quite typical in the Arab region. However, the paths to work opportunities that facilitate women’s work opportunities are often built by males, which reinforces the male dominance of work opportunities and, consequently, women’s reliance on men established in the workplace. Suad Joseph (1999) refers to this as “patriarchal lineality” and illustrates this phenomenon by citing several prominent female politicians in Lebanon who all had husbands or fathers as previously celebrated political figures. In the UAE, in-depth interviews with 15 female Emiratis resulted in a classification of a “facilitated career” group, which included women achieving high ranks at work through family or family connections (Omair, 2010).

At the Workplace

Studies on women managers’ experiences and reflections at the workplace in Lebanon and the Arab region illustrate barriers to equal opportunities including pay differences between men and women, exclusive participation, and limited access to professional development. Among 411 female managers in Lebanon, 61.1 % felt that men had more professional development opportunities than women, and 60.8 % wished they had access to more professional development opportunities (Tlaiss & Kauser, 2010). Regarding pay, 53.4 % of this sample claimed that women earn less than men, and 82.3 % claimed they were discriminated against in promotions based on their gender (ibid, 2010). Pay differences across the sectors in Lebanon, however, seem to vary. For instance, women leaders in higher education have expressed gender discrepancies in salaries, while nursing and banking sectors appear to show much lesser degrees of pay differences (Jamali et al., 2008).

Specifically, the banking sector in Lebanon has received a degree of praise in its perceived accomplishments of promoting equal opportunities. The vast majority of 61 women bank managers in Lebanon feel that they are themselves at work and are listened to equally (Jamali et al., 2006). Moreover, Jamali et al. found the banking sector to be "successful in creating a gender-inclusive culture" (p. 635). Looking closer at the results, however, the authors may have too prematurely rejected the hypothesis that these women receive professional development opportunities. The results are presented as "yes," "sometimes," and "no" responses. The "yes" and "sometimes" responses indicate that their perceptions and/or experiences exist to some degree. Therefore, the respective responses – yes, sometimes, and no – to the statements below indicate that approximately two-thirds of these women tend to agree that they:

- *Have fewer opportunities than men for professional development at work* (25, 44, 31 %)
- *Receive fewer opportunities for professional development than you wish for* (22, 45, 33 %)

In addition, their rejection of the hypothesis that the organizational climate as a barrier to women's equalities at work may have also been unqualified since, again, two-thirds of the women leaned more towards the beliefs that:

- [They] *have been unfairly judged* (3, 57, 39 %).
- *Perceptions and stereotypes about women's professional capabilities constitute barriers to women's advancement* (21, 46, 33 %).
- [They] *must be more accomplished in their work than men…to be promoted* (44, 21, 34 %).

We see a clear "two-thirds trend" of perceptions of being discriminated against or limited in their opportunities to develop at work and remunerated fairly.

Gender-based inequalities in the workplace have resulted from various types of barriers, which appear to have primarily taken shape from the organizational culture and sociocultural norms and attitudes. In Bahrain, among 94 Bahraini, Omani, and Jordanian women managers,[1] the majority of participants claimed that their organizations did not have policies promoting equal opportunities such as maternity leave and protection against sexual harassment (Metcalfe, 2006). Moreover, they felt that professional training opportunities were not typically promoted to women due to the expectation of leaving work when getting married to raise children and, thus, 76.5 % saw the business culture as a source of unfairness and discrimination (ibid, 2006).[2]

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[1] The sample also included five women from Pakistan and three from England.

[2] For an additional discussion on the findings of Metcalfe (2006), see (Metcalfe, 2007).

The structural violence enacted through corporate policy has a direct relation to the extent males seem to protect their gender identity-based dignities and positions at work. Interviews with 52 women in middle management in Lebanon revealed barriers to advancing in their careers and found that women leaders (1) struggle in a patriarchal environment that reinforces traditional expectations of women being homemakers, (2) are questioned by men on their competence and commitment at work, and (3) are excluded from informal networks and high-profile projects that result in preparing males for higher positions (Jamali et al., 2005). These barriers have manifested from the uncritical acceptance of socially constructed women's roles and competencies. Indeed, males at work may find these roles and competencies convenient in securing their dominance at work. This may explain why a study in Qatar and Kuwait found that while women "are willing to accept more responsibilities in the political, occupational, educational and social spheres, Arab men are not willing to share these responsibilities with them" (Abdalla, 1996, p. 36). In addition to the work place, women see male dominance at more deep-rooted levels. In one study, women managers in Bahrain voiced that gender discriminations rooted from the religious culture come mainly from men's interpretations of Islam rather than the religion itself (Metcalfe, 2006).

Women managers in the Arab region, so far, have been reported as victims to gender-based violence systematized by males at the workplace. Still, "a significant number of women highlighted the importance of segregated business associations" since they find women colleagues more reliable and less corrupt (Metcalfe, 2006, p. 101). While preferences for segregated work associates are choices that women managers strive for their own benefit, other choices such as lowering their profile at work are for the benefit of preserving male dignities. In Oman, for example, women in senior positions in government, corporations, and educational institutions attributed much of their success to high levels of motivation to excel, albeit "the need to curb" their motivation levels in the male-dominated workplace so not appear threatening (Al-Lamky, 2007, p. 58).

Support Issues When Balancing Home and Work

Managing between homemaking and work responsibilities consistently emerges as a trial for women across the organizational hierarchies. Balancing between the two tends to become more difficult when children are young, have exams, and are more than two (Marmenout, 2009). Seemingly, the key issue lies in who, from the partners, sacrifices or perceives that they are sacrificing time from either work or home. If the well-being of the child was at stake, the women tend to sacrifice work instead of their husbands (Al-Lamky, 2007; Marmenout, 2009). And when some women have given up time from home, they described how they dealt with complaints from their male partners for "spending more and more time at work" (Jamali, 2009, p. 243).

Another form of sacrifice includes adjustments made to fit better work schedules and family planning. In Egypt's northern region, female physicians who work shifts (afternoon or night) expressed difficulties balancing between home and work significantly more than nonshift-work female physicians (Farahat, 2009). Still, shift-work and nonshift-work physicians cope similarly with the challenges of work-home balance by deciding to have a small family (82.3 %), hiring babysitters or housekeepers (76.3 %), selecting non-emergency specialties (i.e., laboratory work) (34.3 %), choosing to live near the health-care units (21 %), and taking unpaid leave (15.7 %) (ibid). Since these studies' sample sets comprised females, as did nearly all the studies reviewed, the inclusion of males in such research studies could better define injustices of women when examining perceptions of sacrifice in relation to actual adjustments made.

Not all women at work and women managers gave testimony to the strains of work-home roles and responsibilities. In Lebanon's banking sector, approximately two-thirds of the participating women bank managers felt that they have received sufficient support at work and when balancing with home responsibilities (Jamali et al., 2006). Although women have testified that a great deal of support, such as encouragement and confidence, comes from their husbands (Al Kharouf & Weir, 2008; Al-Lamky, 2007; Jamali, 2009), they were unable to illustrate actual activities. The support that many women define as sufficient appears to take the shape of verbal inspiration and psychological backing.

Many of the women who struggle with their male partners when balancing work-home responsibilities revolve around the sharing of domestic work. A sample of ten successful women entrepreneurs in Lebanon described how they have tried to involve their spouses in homemaking tasks by "trying to convince the husband in family and child responsibilities" (Jamali, 2009, p. 243). Still, more reliable avenues for support in maintaining the household come from domestic workers.

Assistance in homemaking and child-caring is accessible and affordable in Lebanon and the rest of the Arab region. Live-in domestic workers are commonly found in Lebanese households probably due to the controversial low range of wages (i.e., 120–250 USD per month). Women managers in the Emirates (Marmenout, 2009), Oman (Al-Lamky, 2007), and Lebanon (Jamali, 2009) have voiced appreciation to the affordability of domestic help. Family networks are also a source of support. The sociocultural values for family have provided women at work with a reliable and secure support network. Despite the availability of and accessibility to live-in domestic workers and extended family, many women at work disclosed the emotional burden of guilt. Feelings of guilt have mainly been related to neither spending enough time with their children nor attending to all their children's needs (Al-Lamky, 2007; Jamali, 2009; Marmenout, 2009).

Many women do not have access to such support arrangements including the sharing of domestic work with husbands and, thus, find no other choice but to leave work. Consequently, some women in Jordan felt that this has built a bad reputation for women that prevents employers from hiring them (Miles, 2002). Here, we can see a relation between access to work and work-home support since more support at home may lead to fewer instances of leaving work.

Conceptualizing Injustices of Women Managers in Lebanon and the Region

The literature above investigated the experiences, dilemmas, and concerns of women preparing for and accessing senior administrative positions, developing at the workplace, and managing between homemaking and work responsibilities. These studies illustrated different *locations* and *forms* of [in]justice along with factors associated with inequalities, struggles, and successes. The locations that women leaders in the Arab region had referred to described spaces where activities, structures, and perceptions determined their journeys of [not] becoming managers at the workplace. Most notably, forms of social [in]justice perceived by women's attributions to injustice and success took shape in three locations/moments: seeking and obtaining work, interactions and opportunities at the workplace, and managing between work and home.

When considering, accessing or accepting senior positions, they reported resistance from family who argued that work meant less time from raising children and could prompt society to question the husband's capabilities of providing for the family. Few women reported that their husbands did not want them to mix with other men. Other barriers to access included travel and night-shift restrictions from state legislature and discrimination against wearing the *hijab* at job interviews. Still, few women noted the support received from their families, which suggests that the family is a significant variable in determining the levels of difficulty and ease when accessing senior positions. At the workplace, the majority of women's perceived discriminations illustrated practices favoring men such as women having fewer professional development opportunities, discrimination during times of promotion, and wages lower than their male colleagues. In addition, some felt excluded from high-profile projects and networks and a few described how they play down their motivation levels at male-dominated workplaces. Positively perceived experiences included feeling they can be themselves, listened to equally to men, and able to promote a gender-inclusive work culture. A few women presented a more active dimension of a just and beneficial workplace when maintaining gender-segregated association for reliability and transparency.

Thirdly, when balancing between home and work, frequently women reflected on the struggles of caring for young children and managing feelings of guilt when not spending enough time with them. To better accommodate the children's needs, which many feel do more than their husbands, they take unpaid leaves, select careers near work, and, sometimes, leave work, which reinforces the stereotype that some women mentioned of being more committed to home than work. Still, on the other hand, contributions to successful work-home management were attributed to "affordable" domestic help, encouragement from husbands, and family networks.

The Study

The literature review prompts a range of questions for further investigation into conceptualizations of fairness and equity and root causes such as social and individual constructions of gender roles. We explore the issues identified with social justice that women experience when accessing and working as school principals in Lebanon. Thus, for the semi-structured interviews with women school principals, we inquired into the following:

1. Background information: *Family, written qualifications, and work experience*
2. Becoming a school principal: *What led you to decide to become a school principal? What made it easy/difficult?*
3. Being a school principal and homemaker: *What makes it easy/difficult? What kind of support would you like to have?*
4. Promotion and professional development: *Who do you report to? What opportunities do you have for promotion/pay/professional development? What would you say is the greatest barrier to your own professional development?*

Research Context

In many ways, Lebanon stands out as a distinctive nation in the Arab world. As a secular state, the Republic comprises 18 official religious sects and dozens of political parties with freestanding elections. It is often considered the most liberal country in the West Asian-North African region, especially when it comes to women's liberties. However, gender inequalities resulting from legislature exist. For instance, Lebanese women married to non-Lebanese men are unable to pass on the Lebanese national citizenship to their children. Also, women who are victims of domestic violence require a witness when filing for divorce. So, while the findings from this study may single out Lebanon from its neighboring Arab countries, particular opportunities and barriers will emerge as familiar to the region as a whole.

Methodology

In this study, we examine conversations with 13 women who reflected on their experiences of becoming and working as school principals in Lebanon. Semi-structured interviews explored how they became principals and fulfill their responsibilities at work. The majority of 11 principals interviewed came from private schools and 2 from the public sector. This opportunistic sample resulted from facilitated access into private schools. Also, with no intention to represent all female principals in

Table 37.3 Sample set of women principals in Lebanon

	Pseudonym	Marital status	Child[ren]	Years as principal	Work experience prior to principalship
Private	Rana	Married	2 boys, 1 girl	11	None
	Anis	Married	3 boys	17	Teacher (12), supervisor (5)
	Ruba	Widowed	3 girls	5	Teacher (5)
	Lyne	Partner	None	1	Teacher (10)
	Huda	Married	2 boys	4	Teacher (10), leader in another school
	Sarah	Divorced	2 boys	10	Started as coordinator
	Nadine	Married	2 boys, 1 girl	2	Teacher (25)
	Salma	Divorced	1 boy	17	Teacher, Assist. Director
	Hiba	None	None	6	Director in another school
	Leila	Married	1 boy, 1 girl	4	Teacher (13)
	Reem	Divorced	2 boys, 1 girl	4	Teacher (4)
Public	Amal	Married	2 boys, 1 girl	37	Teacher (5)
	Lana	Married	2 girls	20	Teacher (9)

Lebanon, it is worth noting that over two-thirds (71 %) of the students in Lebanon are enrolled in private education. The participating schools were across three of the six governorates in Lebanon – Beirut, Mount Lebanon, and North Lebanon. Each interview lasted approximately 20–25 min. One of the private school interviews was conducted via an exchange of e-mails due to geographical distance. The interviews were conducted in Arabic, French, and English. All were transcribed into English for analysis.

Results

The group of 13 female school principals presented a wide variety of marital statuses and years in school leadership posts (see Table 37.3). This sample shows the majority of interviewed principals have two to three children. Also, just over half the women that have children live with male partners. The significance of marital status, the gender of children, and private/public sectors emerged throughout the anecdotes these principals shared.

Access to Leadership Roles

All principals but Rana have had previous teaching experience. Salma, Huda, Sarah, Hiba, Lana, and Anis progressed across various administrative roles including supervising, coordinating, and directing. Only Reem and Lana hold a written qualification in the field of educational leadership, though Reem left the school in 2009 and teaches full time at university. The more personal experiences of how these women reached their leadership roles begin to illustrate possible roots to social [in] justice issues of women leaders in Lebanon.

First, some of the leadership appointments based on sociocultural and political factors indicate that access to leadership positions do not fully recognize women's qualifications. Many private schools in Lebanon are family-run businesses. So, while Leila had taught in the family-run school for 13 years prior, Rana was "assigned" to the post by her husband who was working in another country, despite her lack of teaching and leadership experience in schools. Rana emphasized that becoming a principal was her passion and choice and attends workshops to learn and cultivate her professional knowledge. Still, at face value, a male appointing his wife short of practical knowledge or certification could depreciate the experiences and qualifications of women becoming school leaders.

In the case of Amal, a public school principal, political factors had overlooked her abilities as an educational leader. Indeed, politics posed as a barrier for Amal, which "for years" had "delayed me from reaching where I am." She explained further that politics in the public sector are "the basis for everything" and that "degrees, experience and references will not take you" but connections will. Lana refrained from admitting that politics contributed to her appointment but declared that politicians interfere in her school.

Just over half the principals described how their roles and relationships directly related to the family also emerged as issues that either delayed or facilitated opportunities to be school principals. While Leila and Rana were already part of a family-run school business, Ruba (whose husband had passed away when starting the post), Amal, and Lana had explicitly noted encouragement from their husbands when deciding to take the post. Only Nadine and Anis had mentioned objections from husbands, which apparently did not influence their decisions. Though quite rare, other family members also showed disapproval. Lyne reported that her mother was concerned about the family losing priority from being principal, and Anis' brother protested against the promotion to principal since "he had not been principal yet." Being available to raise children, however, seemed to be the most significant factor in deciding whether or not to accept principalship. For instance, Nadine, Lana, and Salma accepted the leadership roles once their children had either grown up or at least started attending the school they would work in.

Balancing Between Home and Work

The principals reflected on the extent to which their partners and families were means of support and the approaches taken to facilitate the balance between home and work. From the 12 interviewed, 6 were married and living with their husbands with only Rana having her husband working overseas. Lyne had a partner but lives with her mother. Reem and Sarah, currently divorced, reported on their experiences of working and living with their former partners. Although they did not explicitly state the reasons behind the separation, their anecdotes and experiences indicated that the struggles of establishing shared responsibilities may have played a significant role in deciding to end the marriage. Of the nine women who worked while having male partners, only three reported distinct limitations from their husbands who did not contribute with the cooking, cleaning, driving the kids to and from activities, and taking care of the children when they got sick.

The women who described their partners as supportive illustrated three types of supportive partners. The first was the instrumental partner who, portrayed by only Huda and Leila, would take the kids "to the promenade while I stayed at home correcting and preparing" and regularly "gives the kids their baths, takes the kids out to give me time for myself" and shops for groceries. Huda had already begun working when she married. The second illustration was the convenient partner, who is "not demanding," "has no problem [eating] lunch alone," and "whatever there is at home, he'll eat, same thing with the boys." And, finally, the rhetorical partner whose views that women should work for greater independence and impact on the community were sufficient to deem the husband as supportive. Although Leila expressed her appreciation for gender-based roles and differences, perceiving the supportive male as agreeable and sympathetic reveals the extent to which gender-based roles are deeply engrained in women. Moreover, their experiences have shown that being convenient and rhetorically supportive does not necessarily result in shared domestic responsibilities.

When sharing their own experiences, the principals described conveniences that assisted in managing responsibilities between work and home. Grandparents, an aunt, and close friends had helped in many ways including picking the children up after school, providing meals, and looking after the children when the children were sick. Additionally, Rana has two live-in housekeepers and a driver, while Anis, Amal, Leila, Nadine, Lana, and Reem have one each who takes care of the "dust and laundry and doing the dishes" leaving the mother to help with the kids' studies and driving them to and from activities. Only Sarah had neither hired nor familial help. Besides the support for daily tasks, Huda, Leila, and Salma reported on convenience of having their children attend the same school since "you start and finish school with the kids" and have the same vacation times too. For Salma, she eventually accepted the directorship once her child started attending the same school.

One interesting observation was that Ruba was the only participant who mentioned help from the children "by accepting the fact that I won't be there all the time" and preparing "for creative things such as parties, theater, slogans [and] posters." This may have been attributable to either all three children being girls and the normative expectations of girls as "helpers." Direct functional support from the children may have also proceeded from the passing away of her husband when she started work, or the combination of the two variables, each unique to the sample of the principals interviewed.

Despite the apparently available support from family and live-in housekeepers, Salma and Nadine delayed work for child-rearing. From those that maintained their leadership roles, however, nine described how they deal[t] with the emotional burden of sacrificing time from the family. Some of these sacrifices include not being available for the children when they were sick (Reem & Lana), when mom got ill (Hiba) and not having "hubby time" or time with her husband (Leila). When caring for the infants, Sarah and Reem expressed feelings of guilt "when I used to put my child at the age of 40 days in the day care center to be able to go to work." Furthermore, some described how their children's claims of feeling neglected created sentiments of guilt like when "my kids used to blame me for taking care of the school more than I do for them" (Rana & Lana). Anis recalled times of armed conflict when you are responsible for the safety of the children. One day, during an air raid, she spent the time at school making sure the students had arrived home safely. When she called home to check up on her son, he said, "It's great that you remembered me." Anis continued, even with a sick child home alone, "You just can't leave the students, we had 1300." Overall, emotional burdens are shared among the women when wearing several hats alone:

> Women leaders in Lebanon suffer tremendously in general, especially in the educational field. We are expected to lead schools, homes and be a wife and a mother. This is too much. We need more support and more understanding in this patriarchic society of ours. Don't misunderstand me, I have nothing against men, but we are suffering. (Sara)

All 13 principals illustrated some form of emotional strain like guilt and fatigue that followed time away from expected family responsibilities to leadership roles. Only Nadine and Leila wished for more time for themselves.

Equal and Professional Development Opportunities at the Workplace

At the final stage of the interviews, the principals were asked who they report to, if pay was equal, and about their opportunities for promotion and professional development (PD). In the private sector, they report to school boards and males (some are school owners), two report to females who are subordinate to males, and the public school principals are accountable to the Ministry of Education and Higher Education (MEHE). As for pay, eight claimed that pay was equal between male and female principals, Lyne was unsure, and the principal Sarah, the only principal who reported unfairness in salary, claimed that "the guy who I replaced earned three times more my salary." Ruba claimed that one's pay "is up to how you negotiate" and "has nothing to do with gender." "What differs between a man and a woman," said Huda, "is that a woman will not go and ask for a raise while a man would do it claiming that he has a family to support."

Nearly all described the opportunities that they had taken for PD in the forms of workshops, seminars, and conferences. Lyne preferred to read books on school leadership and Nadine is still waiting for opportunities organized by the school. The majority, though, attributed PD with pursuing academic training and qualifications, from which five expressed intentions for (Hiba, Anis, Nadine, Lyne). Hiba had started doctoral studies in the United States but returned to Lebanon to be with her mother after her father passed away. Anis and Nadine shared similar attitudes of turning down higher studies since it would need more time away from home and children. Missing out on opportunities for further studies may have played a part in Anis once turning down a promotion because she "felt that [she] needed more of an academic background in education." A few of the principals identified family as part of the barrier to PD activities including a “lack of money, time and being a single mom” (Sarah) and the load between work and family duties (Amal). Lana said she waited for her children to grow up before pursing doctoral studies. In another direction, Nadine feels that “Now, I don’t need to anymore” despite her initial motivations to develop professionally merely postponed to raise the children. Similarly, Lyne had once considered graduate studies in educational leadership but, at the moment, “I want to enjoy what I’m doing.” Seemingly, the various understandings of professional development are starting to emerge as *written qualifications for competency and promotion.* This construction of PD based on extrinsic motivators could indicate a degree of resistance to further develop practice through collaborative and reflexive approaches. Alternatively, PD that requires a great amount of time and financial resources can significantly and inconveniently add to work and family responsibilities and, thus, become assimilated as unnecessary and burdensome.

Discussion

The experiences of women in Lebanon reaching managerial positions and working as organizational leaders are similar to those found in the region. In the discussions below, we present trends emerging from their conceptualizations of justice and injustice. The themes prompt discussions on how these school principals have interpreted their experiences and indicated the variables that apparently determine the form and degree of social [in]justice, namely, constructions of gender roles, practices in the private, and public sectors and State legislation.

Conveniences and Challenges

Women school principals seem to have an occupational advantage when perceiving their school-based profession as convenient for balancing between work and home since they share the same school holidays as their children. Though an additional advantage is attending the same school and spending most of the day in the same proximity, one was still concerned of what to do when their children finished their school day early.

An opportunity more commonly shared among this sample and women professionals in the region is the availability of affordable domestic help and culture of familial support. Women across the Arab region (Omair, 2008) including Oman (Al-Lamky, 2007; McElwee & Al-Riyami, 2003), the Emirates (Marmenout, 2009), Lebanon (Tlaiss & Kauser, 2010), and Saudi Arabia (Vidyasagar & Rea, 2004) described how live-in domestic helpers have allowed them to commit more fully to work responsibilities. An ethical controversy, however, does loom behind this seemingly fortunate opportunity since women migrant domestic workers in Lebanon

(Jureidini & Moukarbel, 2004) and the region (Chammartin, 2004; Esim & Kerbage, 2011) have limited civil rights, experience abuse, earn below minimum wage, and excluded from labor laws. In accord with Shah and Al-Qudsi's (1990) speculation, we find the economics of social justice foreseeing how the increase in women workers in the region could reinforce the injustices of domestic workers since the demand of domestic workers will inadvertently increase. Therefore, the status quo of domestic workers in the region causes us to hesitate endorsing such provision as a sustainable means of facilitating opportunities for women to work.

The culture of familial support, on the other hand, is a long-lived tradition of family and friends sharing the demands of daily chores. Testimonies from all participants but Sarah (divorced with two boys) showed how parents, grandparents, and close friends helped with preparing meals and watching over the children after school. This culture of communitarianism consistently manifests itself as a factor in the successful management of work and home in the cases of Lebanon (Tlaiss & Kauser, 2010), Turkey (Aycan, 2004), and Saudi Arabia (Vidyasagar & Rea, 2004). However, the culturally established networks, proximities, and connections among relatives and friends seem to equally harm women's processes of taking on senior positions. For instance, in the private sector, a small number of the women principals worked in a school established by either their husbands or other male relatives. Access through patriarchal lineality (Joseph, 1999) not only reinforces male dominance but also potentially depreciates the skills and qualifications of women as school principals. Also, some of the principals reported different degrees of resistance or caution to taking on the senior administrative position, which a mother, brother, and several husbands had voiced.

The dynamics between most of these women principals and their husbands showed a range of reactions towards husbands' apathy in relation to day-to-day tasks at home, despite the support from domestic workers and surrounding friends and family. Though unquantified through large-scale surveys, we notice a relationship between divorces, perceptions of husband's lack of contributions to domestic responsibilities, and pursuits to achieve senior positions. The 3 divorced women in this sample of 13 show a near similar ratio to the 4:14 divorced women in Oman, who prioritized financial need more frequently than the other ten participants (McElwee & Al-Riyami, 2003). Female managers in the United Arab Emirates (Marmenout, 2009) and Turkey (Aycan, 2004) consistently related anecdotes about ending relationships in order to continue working. Still, finding ways to balance between work and home was expressed as more desirable than leaving one for the other among the samples in Turkey (Aycan, 2004).

The principals in this study who reflected on the supportive practices of their husbands described different forms of support that appeared either instrumental, convenient, and/or rhetorical. Likewise in a sample in Jordan, Al Kharouf and Weir (2008) identified support levels suggesting degrees of superficiality in the consistent testimonies of women describing their husbands as supportive by agreeing with their wives to start work. The conceptualizations of partner support levels, dynamics of communitarian and familial assistance, and the women's responses to barriers and advantages surface a number of deep-rooted issues. Below, we critically engage with those associated with gender roles and gendered structures.

Conceptualizations of Gender Roles and Justice

Conceptualizations of gender roles and social justice, appearing at social and individual levels, seem to significantly determine how these women school principals perceive and experience barriers and opportunities. We begin to draw on their expectations associated with being a woman at work and mother. Moreover, their testimonies and manifestations of who sacrifices and inherently assumes nearly all domestic responsibilities piece together constructions of gender roles, which directly and subtly influence their lives as school principals.

The principals' constructs of gender roles emerged from descriptions of:

1. Husband's roles as "helpers" juxtaposed to sharing domestic responsibilities
2. Husband's behaviors perceived as helpful by "has no problem" having "lunch alone" or not being picky with the meals prepared
3. How the Lebanese culture sees women having a "full-time job at home"
4. How they see men's self-concepts as being the "money-makers"

Defined roles for men and women emerge as prominent features that affect women's access to and working experiences in senior positions, which Omair (2008) found as established sociocultural norms across the region. Still, camouflaged among the social expectations of men and women's roles, we find similar suppositions from a majority of the women principals. Alongside the clear frustrations of fatigue from managing between home and work responsibilities, they subtly advocate for opportunity and difference more than for equality through some of the references to husbands as "helpers" than domestic partners and illustrations of convenient partners who are content with the meals prepared.

More explicit descriptions of women's roles, however, have appeared in studies in the region such as Turkey where Aycan (2004) found that women agreed more than men on the item, *The place of a woman is near her husband and being a good mother* and, thus, seeming "to hold more 'traditional' gender roles compared to men" (p. 463). In the creative arts, Dutch photographer Hassink (2008) collaborated with the Arab International Women's Forum to document the lives of 36 successful business women in 18 Arab countries through photographs of their office meeting tables and home dining tables. In addition to raising profiles of Arab women amidst Western-projected stereotypes and creating a medium for representation in certain societies that prohibit portraits of women, Hassink also noted that some of the women were "extremely keen on participating in this project because they thought it was very, very important" (Aperature Foundation, 2009). This photography project reinforced the significance of gender roles to women who identify themselves as homemakers and self-empowered individuals.

Regionally and nationally, a gender-differentiated approach (see Lister, 2003) consistently emerges as a dominant paradigm for social justice of women. Regardless Lebanon position themselves from, gender roles are still related to barriers and challenges. Choosing to raise children, some accepted posts or started principal careers once their children were either grown up or started attending school. Also, the ideals of being a mother and wife – whether determined by self, family, or society – set expectations that, when not fully met, resulted in guilt (i.e., not spending enough time with children or with partner) or emotional fatigue (i.e., worrying about what to do with the child once their school day finished and not having time for self). Furthermore, their self-described roles as homemakers could restrain them from positioning themselves as "family provider" to negotiate salary, an identity that Huda claimed men turn to for pay raises. The roles that women chose to assume and fulfill in this study are challenged by structures, which we found at private and State levels.

Structures of Gender[ed] Constructions

The private sector emerges as a space in education that reinforces, what Suad Joseph (1999) coined as, patriarchal lineality as integral to the processes of accountability and access. All but the two public school principals reported to a male authority, a male-dominated board of directors, or a female subordinate to a male director. Male figures are typically found at the top of the management chain as sole proprietors or religious leaders, especially since schools in the private sector are most commonly founded as private businesses or, according to Abouchedid (1997) religious-based missions. Also, only 2 of the 13 principals are directly related to the sole proprietors of the school; one reporting her husband assigning her the post, which she expressed a passion prior to the post. Practices of women accessing senior positions facilitated by close family/social connections or *wasta* is indeed a global phenomenon with a higher degree of significance in the Arab region (Tlaiss & Kauser, 2010, pp. 470–471). Albeit the conventionalism of *wasta*, women's attainment of senior positions through men reinforces a gender hierarchy of males as providers of opportunity and could possibly depreciate women's skills and abilities to manage and lead.

From the two public school principals' testimonies, politics appeared to have been a more significant barrier to women becoming school leaders. Though public schools in Lebanon must be secular, they still develop a confessional-based staff and student body, largely due to the sectarian identity of communities the school is located in. Amal's declaration that "politics" and "connections" supersede "degrees, experience, and references" defines a culture of *wasta* in a confessional-based organizational structure. With regard to accountability, public school principals report directly to the MEHE. While more evidence is needed to suggest the presence or absence of gender-based discrimination, we find that the public sector is less likely to be a space where male authorities pave the paths for successful women leaders.

State legislature and administrative practices in the private education sector constrain the roles and positions of women in society as homemakers, child-rearers and male-dependent. Articles 28 and 29 of the Labor Code in Lebanon entitle women with maternity leave of 7 weeks and full wage replacement. However, parental leave by law in Lebanon is solely available to mothers. For fathers, parental leave is

> …one of the key policies for improving gender equity at home, reducing marital stress, and contributing to the healthy development of newborns by increasing paternal involvement with their children and families. Paternity leave policies can also increase equity in the workplace. (McGill Institute for Health and Social Policy, 2012)[3]

At a global scale, half the countries in South America and over 80 % in Europe give fathers paid parental leave (McGill Institute for Health and Social Policy, 2009). By providing only women at work and not working men paid leave to care for the newborn child, the State becomes largely responsible for the social and individual expectations of women rearing children, sacrificed work opportunities to raise young children, emotional burdens of guilt from spending time away from family, fatigue resulting from the managing domestic and work responsibilities, and the gender-based disparities of pay.

Conclusion

In this chapter, we examined women's experiences of becoming and being school principals in Lebanon. By conducting a comprehensive literature review of studies on women managers in the Arab region, we drew up a conceptual framework showing a range of injustices and locations where they manifest, namely, when accessing principalship, developing as professionals at the workplace, and managing between home and work responsibilities. Based on these themes, we interviewed 13 women school principals in Lebanon and uncovered structures that sustain the injustices of women pursuing and maintaining school leadership roles in Lebanon and, by and large, the Arab region.

The justice is that they hold gender differences to be important; they have their own roles. Many women showed content with their roles as homemakers and the kind of (rhetorical, compliant and emotional) support from their male partners. However, the shortcomings of a predominant gender-differentiated approach are evident. At the emotionality level, desirable traits of assertiveness, self-confidence, and resilience emerged. However, they were coupled with emotional burdens of guilt for not spending time with family or prioritizing work responsibilities over children, frustrations of lacking 'me' time, and general fatigue from sacrifices made to fulfill individually/socially gendered roles and expectations. In addition, the assignment of positions by male seniors or *wasta* could depreciate the skills and abilities of women as leaders and managers.

We uphold the freedoms of choice and dignities of individuals. Thus, we are deeply concerned with the extent to which choices are intersubjectively and critically examined. Of the numerous core issues that have emerged in this chapter, we highlight two key discourses for public debate, civil action, transformation, and self-reflection. First, structures found at organizational and State levels define the positions and functions of genders. In organizations, women leaders consistently accountable to male authorities situate women as subordinate regardless of their positional power in administration. Furthermore, parental leave for mothers only functionalizes women as the child-rearers resulting in numerous consequences including sacrifices to professional work, emotional fatigue, and socially constructed, minimalist notions of support from male partners. Second, most roles of what men and women are expected to do are defined and, most likely, preferred. These women (like many others around the world) could experience discomfort seeing their husbands actively engaging in child-rearing and preparing meals, which could be perceived as intrusive or threatening to their gendered identities.

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[3] *Raising the Global Floor* is a research initiative carried out by researchers at the McGill University Institute of Health and Social Policy and the Harvard School of Public Health for the *World Legal Rights Data Centre (WoRLD)* global database.

Further research could focus more on school principals' experiences and perceptions in the public sector. Also, similar examinations with male principals will allow for better understandings of gender-related or gender-specific injustices including the pressures males may feel as a consequence to the construction of "providers." Alongside the sample of principals, future studies can investigate the journeys of teachers or other individuals who have tried but did not become senior administrators. To more accurately interpret the conceptualizations of gender differences, studies can also introduce variables that identify sexism. We urge researchers, however, to exercise caution and care when revising existing instruments for the cultural context. Finally, the extrinsically based motivations for professional development that the school principals described prompt action research studies examining school-based, reflexive approaches that would overcome the reported financial and time limitations.

The prominent gender-differentiated approach to social justice among women principals in Lebanon is often found to be in conceptual tension with gender-neutral approaches that advocate for equality (Lister, 2003) and, thus, prompt examinations into normative approaches for "equal but different" (see Blackmore, 1996; Lister, 2003). In an attempt to reconcile these two approaches, Gewirtz (1998) maintains a postmodern approach for equality and difference through a relational dimension to address individuals or distinct communities by responding to their needs and ensuring freedoms to mobilize. Without the recognition of these needs and reorganization of structures that prevent means to address issues of social injustice, women principals in Lebanon will continue to normalize emotional fatigue, burdens of guilt, disparities at work, and sacrificed opportunities as part and parcel of being school principals. We, therefore, advocate for the following four principles for guiding policy and social transformations:

1. Provide equal time of parental leave for mothers and fathers alike.
2. Promote transparent and inclusive methods of hiring senior administrators.
3. Examine secondary subjects of social injustice in addition to domestic workers.
4. Encourage critical engagement with inter-subjective constructions of gender roles.

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Chapter 38
Searching for Social Justice: An Examination of the Views of Alternative School Educators in the San Joaquin Valley of California

Monty J. Thornburg

This chapter explores the meaning of *social justice* for educators who work with "at-risk" youth. Issues related to social justice have been at the center of my reflective practice for years as a teacher and administrator and as a graduate student and researcher since joining the National Teacher Corps in Alabama (Terrar, 2009). Not only is social justice an issue for those like me who work with students who find little social justice in their education, but it seems to be an issue for all educators: "Educational leaders today must operate in a post-modern world where debates and conflicting attitudes about the meaning of social justice exist" (Beck, 2011).

In this chapter an exploration is structured to contrast the *social justice* thinking of John Rawls (1971) in *A Theory of Justice* with that of Friedrich Hayek (1976) in *The Mirage of Social Justice*. Rawls discusses *distributive justice*, *equity,* and *equality of opportunity* in his theory and, by implication, proposes that education leaders should work toward the common public good using democratic processes. *"Any approach to social justice that does not examine the school's role in perpetuating the larger social inequities which exist on the political economic terrain serves to reinforce and perpetuate them"* (English, 1994, p. 91). Rawls' social justice theory, in my view, involves ethical and moral judgments such as provided in Starratt's (1994) Ethical School Model. The model includes the following: caring, justice, and critique. *Caring* is defined by asking the following question: What do our relationships ask of us? *Justice* is defined by asking the question: How shall we govern ourselves? And *critique* is defined by asking the questions as follows: Who controls? Who legitimates? and Who defines? These questions are in Thornburg (2001, p. 72) as originally found in Starratt.

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Hayek, in his libertarian view, rejects the Rawls' theory of justice. He argues that *social justice* is centered only in *equal access*, *due process*, *policy formation,* and *implementation* for the individual, not for groups or classes of people. This libertarian view has moved K-12 education toward privatization and competition in recent years. This agenda began in earnest, perhaps, with the publication of *Free to Choose* (1980) by Milton Friedman. William Bennett, President Reagan's former Secretary of Education, advocated for vouchers and other libertarian policies in the middle 1980s (Thornburg, 1986). Hayek was a university colleague of Milton Friedman, and both were Nobel Prize winners in economics. These three giants of philosophical and economic thought – Freidman, Hayek, and Rawls – provided me and the interviewees with a conceptual dichotomy to frame our social justice discussions. That said, Nell Noddings (1992) in *Justice and Equality in Education* identified three themes in education also at work during the last 30 years: (1) inequalities in physical resources, (2) inequalities in basic relationships, and (3) curricular inequalities (pp. 165–177). The first theme is represented in many ways by Title I and became dominant starting with President Lyndon Johnson's War on Poverty. During that time, *social justice* was viewed by many as equivalent to civil rights for historically oppressed groups: African Americans, Latinos, women, Native Americans, and others.

The second theme, inequalities in basic relationships, was inspired by the War on Drugs initiated during the Reagan years in the 1980s. This theme became dominant in the 1990s through the implementation of the Safe and Drug-Free Schools and Communities Act (SDFSCA). It was during that time frame when zero tolerance (see also White & Cooper, Chap. 53 in this volume) became the solution to education problems across America, particularly after Columbine (Thornburg, 2001, pp. 5–8, 39–49).

The third theme, curricular inequalities, is now hegemonic and appears to dwarf other concerns. Michael Apple (2001) in "Educational and curricular restructuring and the neo-liberal and neo-conservative agenda," recognizes two points of view and states as follows:

> There is a new alliance…exerting leadership in educational policy and educational reform. First, there are neo-liberals. These are economic modernizers who want educational policy to be centered around the economy, around performance objectives based on a closer connection between schooling and paid work…The economic modernizers are in leadership, by and large, in this new bloc. They see schools as connected to a marketplace, especially the global capitalist market, and the labor needs and processes of such a market. They also often see schools themselves as in need of being transformed and made more competitive by placing them into marketplaces through voucher plans, tax credits, and other similar marketizing strategies. A second group is neo-conservatives. In most cases it is important to make a distinction between the neo-liberal economic modernizers and neo-conservatives.…Neo-conservatives often agree with the neo-liberal emphasis on the economy, but their main agenda is cultural "restoration." Examples in the United States are people such as E.D. Hirsch, former Secretary of Education William Bennett, and the late Alan Bloom. These are people who want a return to a totally romanticized version of schooling in which we have a standard curriculum. (p. ii)

California and National Context of the Study

This study was conducted with educators who work or have worked in California's San Joaquin Valley. The San Joaquin Valley is the place, arguably, where the most important civil rights movement outside the southern United States occurred. The San Joaquin Valley is similar to the south with respect to rural populations, poverty, and hate groups. Cesar Chavez led the farm worker movement in the San Joaquin Valley when *social justice* seemed to equal civil rights in the 1960s and 1970s.

The story of the San Joaquin and most of California is of a great Diaspora. In May of 1996, the California Research Bureau released a report comparing the San Joaquin Valley to other states. If the San Joaquin Valley were a state, its per capita income would be between South Carolina and Alabama and fourth in the number of persons involved in farming, forestry, and fishing, surpassed only by California, Florida, and Texas. It would be larger in area than ten states and 31st in population exceeding 20 states. It would rank eighth in population of Asian ancestry, sixth in Hispanic population following California, Florida, Illinois, New York, and Texas, and third in persons of Mexican origin or decent, after only California and Texas.

The San Joaquin region, in addition to being poorer on average than most of California, is also the place where prison populations and incarceration of its residents, mostly minority, are larger than average. The average incarceration rate for adults in the San Joaquin Valley is 130 % compared with the rest of the state and ranges in one county as high as 155 %. The largest state woman's prison in the world is in the valley's center. A billboard sign posted by the ACLU reads that "Welcome to America, Home to 5 % of the World's Population and 25 % of the World's Prisoners" is telling. It tells that the "school-to-prison pipeline" in San Joaquin as explained by the Advancement Project's research is a severe problem for educators. The Advancement Project's research articles (2002–2011) explain how schools systematically test, punish, and push-out students, and these studies parallel the experiences of participants in this study.

The high adult incarceration rates contribute to the foster and homeless youth populations and gang problems. In some regions in San Joaquin, mostly in the foothills, the most virulent White hate groups in America took root (Anti-Defamation League [ADL], 1996; Southern Poverty Law Center [SPLC], 2003). Some of these groups have been responsible for the rise in hate crimes in prisons nationwide as their ideologies have spread beyond prison walls over the past few decades. At the same time, drug problems and gang activities are as virulent as any place in the United States according to a Social Justice Journal article (Rodriquez, 2005). The San Joaquin Valley matches the worst incarceration rates in the United States.

At-risk students for the purposes of this study include students sent to California Alternative Education sites through disciplinary action (suspensions/expulsions), through referrals from the criminal justice system through juvenile probation, or through the California Student Attendance Review Boards (SARBs) process. SARBs handle cases, including behavioral intervention cases for at-risk youth through community multidisciplinary boards. SARBs are established by California legislative mandate in each county. The alternative education sites to which students are sent include Continuation Schools and Opportunity Programs (least restrictive), Community Day Schools, County Community Schools (more restrictive), and Court Schools within juvenile detention facilities (most restrictive).

California Education Code explicitly gives direction on the process used. According to a discipline matrix, there are 41 possible violations and some are redundant. Typically, when violations occur, independent panels of administrators participate in hearings and make recommendations to boards of trustees. Five offenses require zero tolerance, and according to law, administrators must recommend expelling the student. Administrators may recommend expelling students on most of the other violations; however, zero tolerance "thinking" and "group think" (Janis, 1972) may sway some. A (CDE) California Department of Education consultant pointed out that by "suspending" expulsions, other outcomes are possible too. Parents sent packets of information each year that includes discipline information, often with the title, Zero Tolerance Discipline Policy. Others include the title Assertive Discipline Policy. Data file systems used to track student disciplinary history use these same titles indicating a clear bias toward assertive discipline and zero tolerance methods.

The competition for average daily attendance dollars over the past 30 years (Timar, 2006) has changed California's educational processes away from "local control" and cooperative, democratic, communitarian processes toward individualistic, competitive, and legalistic processes controlled at the state level. I have often observed administrators talking about students in terms of their average daily attendance (ADA) value, and it has appeared to me that too often students are thought of as commodities to be competed for. Due to an overreliance on state-level funding, districts and schools now find themselves placed into competitive situations with each other and with charter schools. This coupled with (NCLB) No Child Left Behind high-stakes testing standards; districts have incentives to retain high-achieving students and discard low-achieving or disruptive students into alternative programs funded differently.

Incarceration Comparison with Other Countries

According to the Sentencing Project:

> The United States is the world's leader in incarceration with 2.2 million people currently in the nation's prisons or jails – a 500 % increase over the past thirty years. These trends have resulted in prison overcrowding and state governments being overwhelmed by the burden of funding a rapidly expanding penal system, despite increasing evidence that large-scale incarceration is not the most effective means of achieving public safety.

The dramatic rise in incarceration in the United States correlates with the change in zero tolerance and assertive discipline mechanisms that grew out of the "War on Drugs" and with the Safe and Drug-Free Schools Act. In my initial study, zero

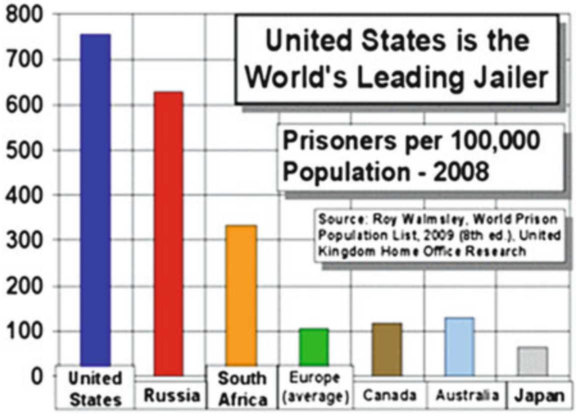

Fig. 38.1 ICPS International Center for Prison Studies. World Prison Population List (8th edition) rate per 100,000 of 218 countries and territories. (Jan 2009)

tolerance and other disciplinary strategies were examined in Louisiana (Thornburg, 2001). According to the Bureau of Justice Statistics, Louisiana has the highest rate of incarceration at 867 per 100,000 with an African American to White ratio of 4.7–1. Now over a decade later, I find that the statewide incarceration rate in California by comparison is 439 per 100,000 with a 6.5–1 African American to White ratio and a 1.7–1 Hispanic to White ratio. The incarceration rate in the San Joaquin Valley region, however, is 130 % higher on average and with a large rural Hispanic population. The U.S. Census Bureau in 2011 lists Black residents in California as 6.2 % of the population, Whites as 57.6 % of the population, and Hispanics as 37.6 % of the population. Louisiana, the state with highest incarceration rate in the United States, has a ratio of Black to White population of 32–62.6 %. Therefore, while both states are clearly discriminatory toward African Americans in terms of incarceration, California appears to be more so based on census data and percentages of White to Black population (Sentencing Project (the)) (Fig. 38.1).

During the preparation of this chapter, I attended California's Third Annual Equity Summit (Watson, 2012b), "Equity, Education and Incarceration: What is California's Future?" I was thus able to reflect on the study's findings and compare them with expert opinions from the summit. James Bell, a prominent civil rights attorney, was the keynote speaker, and he highlighted the difference between incarceration percentages in the United States with other industrialized countries as well as the rise of incarceration rates in the USA over the past three decades. Mr. Bell, in *Zero Tolerance* (2001), wrote "as an advocate for youth in detention" (p. 138) and concluded that there is "too little leadership at the top" interested in the educational well being of incarcerated youth and "too many regulations at the bottom" to help (p. 141). Aligned with Mr. Bell's comments are data compiled by Western, Schiraldi, and Ziedenberg (2003) indicating the growth in spending for incarceration was already 2.5 times higher than for education and this disparity has widened dramatically, since. The growth of incarceration was already at 1,518 % compared with 370 % for education in 1999, and Mr. Bell talked about an increased rate of disparity over the past decade.

Vajra Watson, Director of the Equity Summit and Research for Equity in her new book, *Learning to Liberate* (2012a), dramatically demonstrates through her research that there are ways, outside mainstream education, to break the cycle of social reproduction of poor urban youth. She explains that exemplary leaders, working with youth, can "replace it with *social resistance"* (p. 6) and "*agency"* (Miron & Mickey, 1998). Despite the *ethic of care* or love, competencies, and heroic efforts of the exemplary leaders in her study, Watson (2012a) acknowledges that there is a "current push-pull dynamic between capitalism and democracy" and that "many leaders of school improvement continue to err on the side of the market; that is, they educate to create an economically divided and complacent citizenry" (p. 4). It is the push-pull dynamic she speaks about that is examined in this study.

The Case of the San Joaquin Valley

In the San Joaquin Valley region, the proposed opening of a new charter school became a contentious issue. The public school was closed at the end of the 2011–2012 school year due to poor economic conditions and declining Average Daily Attendance (ADA). According to the superintendent, the reopening of the new charter school would "bankrupt the district." The board of education, however, approved the reopening of its closed school as a charter school (Bowers, 2011, p.1). State charter school law reportedly gave the board no choice even though it was contended that it would be "unfair to poor students" in the rest of the district and there were no provisions for Title I students in the proposal. Research has demonstrated class and racial bias by charter schools (Thornburg, 2012).

Nationally, charter schools in America are significant, since over a million students now attend them (out of 49 million students in K-12 schools). The research literature seems mixed on whether charter schools do or do not improve academic outcomes (Jacob & Ludwig, 2009). Some are lauded as the best hope for poor Black and Hispanic children (Thernstrum & Thernstrum, 2003), but others worry that charter schools openly (Bulkley & Fisler, 2003; Dee & Fu, 2004) or implicitly (Lacireno-Paquet, Holyoke, Moser, & Henig, 2002; Weiher & Tedin, 2002) reinforce racial stratification. One recent Harvard study by the Project for Civil Rights of U.S. Charter Schools (2012) reported that both class bias and race bias exist with charter schools. The Harvard study claimed that with "*subjective student selection, charter schools are clearly achieving a separate and unequal education based on race and class*" in America.

Research Methods and Participants

This "grounded theory" (Glasser & Strauss, 1967) research project has been iterative and heuristic. Both administrators and teachers from the San Joaquin Valley region were interviewed. These educational leaders interviewed were selected using a scaffolding approach. I began with two administrators at the (CDE) California Department of Education. Each interviewee brought a unique perspective about the issues affecting at-risk youth and *social justice* in general using the concepts of Rawls and Hayek.

Additional interviewees were found through research. For example, I found that an upper level administrator in Fresno, California, had presented a dissertation on homeless and foster youth. She sent me a copy of her research, and after I reviewed it, she agreed to an interview. Others were recommended to me or known through professional practice in alternative education, for example, through Juvenile Court Community and Alternative School Administrators of California (JCCASAC). Other participants were university educational leaders at California universities, and some interviewees were chosen on an ad hoc basis when opportunities were presented to learn the views of teachers and other educators from the San Joaquin Valley region.

I interviewed the director of the California On My Honor: Civics Institute for Teachers when I attended the conference in San Francisco during the month of June 2011. The issue of *silencing* of public servants came up in the context of the institute, and when I discussed it with her, she agreed to contribute to the study. Moreover, many of the 40 participants from the institute live in the San Joaquin Valley and/or are involved in alternative education. All of the institute participants worked an entire week on *social justice* and law-related civics curriculum design. This institute experience provided me a rich environment to explore my topic with dedicated and focused educators. The Dean of the College of Education, at the University of the Pacific (UOP) (located in San Joaquin County), met with me and provided invaluable insight, criticism, and suggestions. We met because it was her previous work in educational leadership and the *ethic of caring* (Beck, 1992) that influenced some of my earlier thinking on school-wide discipline in the context of educational administration as I moved toward conceptualizing a dissertation about school-wide discipline in urban high schools.

The interviews of the primary participants were recorded, transcribed, and then coded. I listened for evidence of caring, evidence of traditional justice constructs, due process, and evidence of critique. The evidence that the framework either made sense to the participants or didn't was considered throughout. Each of the participant interviewees was asked if pressures resulting from current political discourse made speaking out either in professional forums or in public difficult. In other words, does silencing of critique occur? Finally, all of the key participants read initial drafts of this document and commented on various parts; thus, the process became both heuristic and iterative. Personal experience, interviews, ad hoc conversations, and other research articles have all been integrated into this research effort.

McNeal and Dunbar (2010) utilized (Lipsky, 1980) street-level bureaucracy theory to analyze their qualitative data. After reviewing their article and methods, I then decided to adopt the concept of street-level bureaucracy because I too could see its usefulness toward understanding how actions can lead to either equality or inequality. This framework is used in the conclusion and analysis to interpret interviews and other related observations.

Structural Contexts

Public Democratic Solutions vs. Privatized Individual Choice Solutions

Each interviewee was made aware of the basic differences between Rawls' (1971) fundamental thoughts about *social justice* and Hayek's (1976) book that rejected his thinking. Information was also shared about the Internet blogs of conservative and even right-wing extremist groups, easily found, that used Hayek's thinking to reject the concept or term *social justice*. Some blogs claim the term *social justice* is code for socialism even communism. There are now postmodern cyber disputes between traditional liberals and conservatives, between progressives and libertarians. Those disputes, perhaps, are understandable and in the postmodern cyber space world as cable news channels employ large teams that daily surf the Internet and social media blogs for stories that are sensational and controversial.

McNeal and Dunbar (2010, p. 296) and discussed in (Thornburg, 2001, p. 39) as follows, provided context for the discussions. In an effort to explain public discourse around issues of school violence, which was the impetus for zero tolerance, John Devine (1996) in his book, *Maximum Security*, couches the public perception into two diametrically opposed tiers. The first he refers to as a "right-wing discourse," which he describes as "chaotic," meaning schools are viewed as being out of control. The second view is described as "mainstream liberal discourse," which he suggests means to "minimize it and psychologicalize it (school violence) as a result of student alienation" (Devine, p. 21). The first view posits "closing the system (schools) down"; the second suggests that schools need to "reform its learning process." In other words, the view of schools from right-wingers is that schools are in a situation of hopelessness as a result of moral and behavioral decay. Consequently, not much can be done to correct the situation therefore warranting school closures. This view places the blame on the victims (i.e., students). Again, Watson (2012a) effectively demonstrates through her research that while education "places the blame on the victims" that through "activism" (pp. 86, 96, 112, 146, 164, 171) to find "social justice" (p. 156) using the pedagogies of communication, community, compassion, and commitment, agency for resistance and change can create conditions where "education is a gateway to survival" (p. 3).

A blog statement was chosen to illustrate to the interviewees how the term *social justice* is being treated in social media. The blog was written by Ms. Flanagan (2009) who had been heartened because she heard the new Secretary of Education Arne Duncan speaks about *social justice.* Secretary Duncan had said, "We have not served all communities equally and this is nothing less than a fight for social justice." Ms. Flanagan wrote the following on her blog:

> So, I put the phrase *social justice* in the title of this blog for all the prickly folks who have their Google alerts set to snag any blogger with the temerity to write about equity and fairness in American education. I could come up with a dozen more interesting titles for this dispatch from D.C. –but the money quote in this blog is about *social justice*, a once-righteous phrase that has lately taken a licking and, one hopes, will come out ticking.

Here are some of the comments made by participants: A former superintendent commented after reading the blog statement said, "There isn't much equity and fairness in many parts of America. It's very disconcerting." He went on to explain that NCLB requirements that now have districts competing with each other and now with charter schools too; it is a real dilemma. He continued:

> Public Education has been its own worst enemy, we complain about the outcomes, yet, we tend not to reflect on what it is we have created… I have a philosophy about this, he said, the whole piece, No Child Left Behind was designed to destroy public education and charter schools are an intermediate step.

Another participant, an educational consultant, responded:

> Statistically, NCLB was designed, albeit certainly not intentionally by all of its authors, for public schools to fail. Those of us here in the CDE tried to ask the question, how do these statistics add up? Eventually, every school will fail!

Another CDE consultant commented:

> We hear from our charter school clients,…We are a charter; we don't have to do that… Many charters are not doing as well as public schools for the at risk…We know this from the kinds of questions they ask, and many are now trying to obtain Title I funds and will have to be monitored.

Soon after these interviews was the California Civics Institute, for teachers, judges, district attorneys, and others spoke to educators about topics related to the function of the courts. Ironically, a few hours before one presentation, we learned that the California Legislature had voted to cut California's Superior Courts budgets. Their calculation in San Francisco was that these cuts would force their Superior Court there to close 40 % of all courtrooms and lay off 41 % of staff. A judge explained that she is very concerned about the direction of society to undervalue collective responsibility as highlighted by the legislature's recent budget cuts to reduce services of the Superior Courts. Juvenile cases, probate, and family cases involving homeless and foster youth, youth on probation, and other at-risk groups are all handled by the Superior Courts. Similarly, "drug courts" for youth and other programs sponsored by the courts are examples of a teaching and learning strategy to assist *at-risk* youth.

The relationship between the courts, *at-risk* youth, and the schools is central to understanding the case of the San Joaquin Valley. The following quote was sent days after I had asked questions about social justice. She reflected:

> What I have found interesting about my work with the Administrative Office of the Courts (AOC) in partnership with California State University San Marcos, is the importance that the court has placed on education. They have funded the California On My Honor: Civics Institute for Teachers (among other amazing public programs for underserved populations) in response to the startling lack of understanding of the judicial branch by the general public. The AOC views this lack of understanding not only as a threat to the judicial branch, but to the democratic principles that were established by our Constitution. They have been doing their part to support teachers, as they believe that education is the answer…they believe teachers are a powerful resource and that they can play a pivotal role in the change that must happen in order to have an informed and responsible citizenry. It is disconcerting to say the least, to be "hit" by these budget cuts from all sides! (Chadwick, 2011)

When I commented that I had observed that administrators are silenced or discouraged from taking a stand on controversial, social issues, or on behalf of at-risk youth because they are seen as outcasts, one CDE consultant responded as follows:

> We were set to put a Community Day School (CDS) into a district. One of the school board members went house to house and invited community residents to come to the board meeting to discuss placing the school in their neighborhood. The board member claimed to be OK or at least interested in the CDS, however, his actions effectively discouraged placement of a school in that neighborhood. Of course that was the neighborhood where those CDS students lived. The CDS was not approved, and expelled students continued to be referred to a county school far from the district, even though it was recognized that the great distance meant few would attend regularly.

Other administrators, too, said that the alternative measures are used by school districts to banish *at-risk* students. They also said that there is a financial tension too. On the one hand, districts want to keep their average daily attendance (ADA) state funding and direct control of students, but, on the other hand, they don't want the disruption in their schools. These tensions were alluded to in other contexts outside the study.

Teaching and Learning Disciplinary Processes vs. Enforcement and Control Disciplinary Processes

Discipline strategies that rely on control and enforcement such as assertive discipline and zero tolerance (Thornburg, 2001, pp. 5–8) were discussed with each interviewee. In an *Urban Education* article, "In the eyes of the beholder, Urban student perceptions of Zero Tolerance Policy," McNeal and Dunbar (2010) explain:

> Yet there is paucity of literature on zero tolerance policy from the voices for which the policy was designed to keep safe—that is, children who behave appropriately. A doctoral dissertation study titled "School-Wide Discipline in Urban High Schools" was conducted in an effort to provide insight on school staff and students' perceptions of violence prevention strategies, including zero tolerance policies. In this study, the data revealed significant differences between fairness, impact on school safety, and overall utility (Thornburg, 2001), in (Urban Education, 2010, p. 296).

The interviewees were asked about the assertive discipline data file systems. The intent was to find out how this particular form of discipline became so dominant. During the interviews, control/enforcement discipline strategies in the form of the Zero Tolerance Policy and assertive discipline were discussed. Data systems track student behavior using these methods. Administrator's wide use indicates acceptance of these strategies. A decade ago I wrote (Thornburg, 2001):

> Despite the dissent and criticism about these measures aimed toward control, suppression, and avoidance of violence, advocates for the use of security and zero tolerance measures have convinced school boards, policy makers, and school administrators to adopt policies nationwide. Many have also been convinced that student fights and other problems need to be dealt with in a criminal-justice-like manner rather than by other traditional humanistic

> systems of discipline. Criminal justice sanctions for offenses such as vandalism, theft, assault, and extortion that are associated with the presence of gangs have been one reason for the change (p. 7) … and … (T)he political rhetoric and random incidents cited seem to demonstrate that the country has moved in a direction that now accepts the premise that student transgressions previously handled by school officials should now be considered as criminal activity. Law enforcement tactics are becoming accepted as a necessary part of public school life. (p. 49)

One California Department of Education consultant spoke passionately about the need for alternative school leaders to demonstrate care by paying attention to student learning outcomes and by teaching in ways that help students to develop emotionally and socially in addition to academically. When discussing with him whether to name him personally in this article, he responded succinctly: “I'm not worried that people discover that I think that education should support successful youth development.”

Alternative school educators throughout the last decade in California have been encouraged to view their students through the lens of resiliency research. Research tells us that resilience is a universal capacity, and all children have a natural, developmental capacity to thrive, even in the face of severe deprivation and adversity. The research also tells us that schools can make a tremendous difference using social justice initiatives as outlined by Bernard (2004):

> As clear as it has become that all young people have the capacity for positive development, resilience research should never be used to justify social and political inaction on the grounds that, somehow, “Most kids make it.” In the face of growing global poverty, abuse, violence, and other threats to children's development, the somehow can no longer depend on the luck of the draw. Increasingly, healthy youth development must depend on deliberate policies, practices, and interventions designed to provide young people with developmental supports and opportunities. As we are learning, young people are resilient, but they are not invincible. (Bernard, 2004, p. 10)

This same CDE consultant pointed out that educators must view students as having assets and not as problems. He went on to say that building resiliency includes recognizing that all students have, and need to build, both internal and external assets.

> We must be forward looking and focus on what students can achieve…as opposed to emphasizing what they've done in the past…We are all at different stages of development and when educators focus on student's assets – in doing so, their actions support both learning and unlearning that needs to occur.

On the other hand, he also recognizes that school districts do not always pay attention to the teaching and learning and the caring when engaged in disciplinary hearings. He acknowledged that a myriad of (sometimes contradictory) California Educational Codes (2010) can prescribe action not suitable for building resilience.

Another CDE consultant concurred independently that zero tolerance, the data-driven assertive disciplinary file used to track students' behavior, is a potential pipeline to the justice system.

> The system is followed as an exclusionary process. The Ed Code has it written in that there is supposed to be a plan to move kids back, however, what is typically written into the Expulsion Order (for example) or the SARB Referral, (for example) is very minimal.

It was acknowledged in different interviews with both CDE consultants that intervention is preferable. One was adamant and reiterated:

> Zero Tolerance literally means that we must intervene. By definition, to tolerate something is to allow it to continue even though we don't particularly like it. Therefore, zero tolerance means that we must intervene, not just let it continue; but, these words do not imply punishment as the form of intervention.

Another administrator who is responsible for several alternative education sites, including a juvenile hall program, said, in contrast: "I hate zero tolerance; I just don't see where it does any good!" She went on to explain:

> When I started as a dean of students I liked Zero Tolerance because it made my job easier. If a student was caught with marijuana, well … you're expelled! Then I began to look at it differently, and I realized after some workshops and so forth that zero tolerance means no due process! Just because a student is below the age of 18 doesn't mean he or she shouldn't have rights!

While remaining optimistic and pointing out that while the rehabilitative Ed Code on discipline is often seen as a legal bureaucratic solution, one CDE consultant insisted on that essential not minimized, deemphasized, or even ignored. He said:

> I usurp the language of zero tolerance to hook them, (teachers and administrators). My background is applied psychology and education, and part of my work here at the CDE is to read a lot of mission statements from school districts. The statements all have blah, blah, blah, to help the student learn, etc. and never bla, bla, bla, to punish or bla, bla, bla to castigate the student. The punishment, etc. is never in the mission statement! I use their mission statements and turn the conversation(s) around.

Another administrator, a principal at an alternative school in a different county, complained to me about the high number of special education students sent to her programs. Her analysis is that many of those students may have technically put themselves in a position to be sent to a county program by violating the Ed Code on "School Disruption and Defiance" more than 20 times. She explained:

> I'm sorry…these (special education) students just don't belong here! Don't get me wrong, I get along well with the Special Education Director, and she knows how I feel. It's just that these students don't need to be exposed to an alternative school where other students who have committed serious offenses also come. I don't know the solution, but, administrators are starting to look at changes because Sacramento, the CDE, is looking at the statistics of the school district(s) that send these students.

A CDE consultant addressed the issues with respect to special education, foster and homeless youth, and the Ed Code on "School Disruption and Defiance" (the most common violation seen) in districts. According to him, the perception of many school districts is that 20 violations constitute a reason for expulsion. His comment was:

> It's just the opposite…the law about not being able to suspend beyond twenty means, you can't suspend anymore. What I tell districts is what you are doing isn't working and you need to find new solutions.

Another CDE consultant believes that solutions can be found, even where things seem desperate.

> I made a visit to some schools in the valley. The poverty levels are super high in those Valley schools. I expected to see a school in 5th year P.I. (NCLB Program Improvement) in shambles, but it was just the opposite. The school provided a good part of their nutrition, safe haven, essentially a second home. So, on P.I. they had to provide those supports and they had very few discipline problems. The reason for their success in my view was that they saw all the kids as their kids. They didn't have a "school on the hill" type of mentality, but rather, strived to take care of all of the needs of their students and not just preparation for testing. The problem is schools could do the same thing without putting a negative and punitive tag on them through Annual Yearly Progress. If you create an environment where kids tend to succeed, they succeed!

The reporting on at-risk youth, with the on-line Assertive Discipline and Zero Tolerance Policy tracking system, may contribute to an overuse of control and enforcement strategies. One administrator with decades of experience explained:

> Yes, assertive discipline came into existence around the same time as zero tolerance. It may have helped lead to it. Since the zero tolerance laws passed, we, (administrators) have not had a lot of flexibility to help kids in trouble individually, to find ways to help them educationally.

Another administrator with years of experience as a hearing officer commented about some of the dilemmas that administrators face where criminality and discipline overlap.

> Every major community in the central valley has a gang intervention unit, it drives school policy, and police departments work closely with the school because schools are a magnet for gang recruiting. Schools are recruiting grounds for gangs. Zero tolerance for gang signs, colors, apparel are created in policy and it goes on from there. In the foothills there's a large amount of poverty, but, mostly white. Racist, skin-heads don't see themselves as gang related but rather as a reaction to immigration. The Skin Heads would put up posters and signs against immigrants. In the foothills I would see some of that when I worked there.

While the prison commitment rates for adults in the San Joaquin Valley remain high compared with the rest of the state, the juvenile commitment rates for juveniles have dropped over the past decade. However, many alternative school youth move back and forth in and out of juvenile detention. I spoke with several interviewees about the high incarceration rates for adults. A Juvenile Court Community and Alternative School Administrators of California (JCCASAC) leader responded:

> There's a disconnect! I know with NCLB about needing good teaching, but, many--most of these kids need more. Many are living with a single parent, grandparent, in foster care (group homes), and many have a parent who is in prison. It's been in the news a lot from Stockton that, the Catholic Charities has a program for Mother's Day. They make gift baskets and bus the kids down to Madera, the Woman's Prison to visit their moms. It's sad!

As acknowledged by several interviewees, youth previously housed in juvenile detention facilities in years past are now placed into the foster care system. Many *frequent flyers,* as they are called, go in and out of juvenile hall. One of the teachers from a juvenile hall school commented in frustration:

> In the Hall, I can't even wear clothing that is red, my favorite color, because of the gang reference. It's not officially against the rules, but is frowned upon. One also has to watch their language. One day I told a student, 'You better get your work done, Buster' and the students in the class all stopped and looked up with their mouths open. Buster is a negative term by Soreneos against Norteneos. On another occasion, a white student came in and made some vile racist remarks and identified himself as a 'Peckerwood' and we had to remove him to his room for everyone's safety. It's sad; one of my students says the gangs are his life. His mom is deported and his dad is dead.

One interviewee with extensive experience in the valley told me the following:

> Once, while serving as a new Principal in one District on Highway 99, while driving home, I had a very frightening experience. I was pulled over, sandwiched between two pickup trucks in the almond orchards. Someone got out and said, 'I'm a representative of the local Nazi Party. We just want to have a conversation with you as the new Jewish principal.' They didn't say much, they just wanted me to know they were there. It was very frightening because they do a lot more in those orchards than grow fruit and nuts!

He then went on to tell about his experience as superintendent after I shared some information about racist and anti-government groups such as Christian Identity, Aryan Nation, Posse Comitatus, and sovereign citizen groups, all of which are or have been affiliated with each other. I shared information about the *Jubilee* magazine (ADL, 1996; SPLC, 2003) and he was not surprised. He went on about another community where he had served as district and county superintendent, and we discussed some instances where each of us had experience with anti-Semitism while attempting to perform our responsibilities as administrators.

Another interviewee, an agency director who works with a school district and manages an anti-bullying program, was equally discouraged in a different way. She is struggling with trying to satisfy the wishes of a high-level administrator who wants to turn her program into an enforcement and control system. The administrator wants the anti-bullying staff to report incidents of bullying to building level administrators and for the information to be placed into the assertive discipline data system. This is very problematic for the director because the essence of the teaching and learning anti-bully program is to teach peer support, empathy, and perspective taking to students. For the program to work, students must trust that they won't be punished for trying and can learn from their mistakes. The program is designed to be nonpunitive. In this case, the street-level bureaucracy is potentially undermining the program. Out of frustration she talked about the difficulty for students to develop the courage needed to act. She went on to tell about a personal experience to illustrate:

> You know, it's difficult enough to gain respect and trust with the students. What we are asking them to do is very hard! We ask them to interject verbally and interrupt bullying. I had a recent experience the other day that shows how hard it can be. It was at the time of the Chavez state holiday, I had forgotten and the DMV was closed due to the state holiday. The next day I returned and along with some other men in the place, we were talking about the closure of state buildings the previous day. They were being very disrespectful of Cesar Chavez and were using foul language. I thought about the lessons we try and teach our

> students. So, I tried to interject, using positive assertive language telling the men that I felt offended because Cesar Chavez stood up for justice. After a couple of verbal exchanges, and being called names, (under their breath), I realized it was hopeless. I realized how difficult this all really is for our students!

During the California On My Honor Teacher Institute and after a simulation lesson, I spoke with a teacher from the valley. The lesson involved the National Socialist Party of America vs. Skokie, 432 U.S. 43 (1977) case, an Appeals Court case involving freedom of speech decided by and upheld by the Illinois Supreme Court. The simulation raised many questions and created a lively discussion. One teacher I spoke with was born and raised in the San Joaquin Valley. During a previous informal conversation, she had mentioned specific communities where KKK marches used to occur, and she went on to tell me where the Grand Wizard of the KKK resides. She also mentioned the peckerwoods and other gangs that she knows about.

While walking back to the hotel after the session mentioned above, I struck up a conversation with her and other teachers. Another teacher from the valley, a teacher that had overheard the conversation, said, "I can't believe how many of my children's parents are in prison!" When I asked her about her comments to the group, she went on:

> We collect Christmas baskets and hold other events. I have gone to their homes many times and some of these children are living in the back of camper trucks without heat and in outside makeshift sheds. NCLB is OK as far as it goes, but, there needs to be more!

As we discussed the ethic of *caring,* one administrator reminded me that I had once said something to him about his having left another district as principal earlier in his career. He seemed irritated! I think he thought that I was being critical of him! We were also discussing how sometimes communities and others in power effectively silence administrators. He went on:

> I left, because I did speak up! In that case, I found that the Superintendent, (name withheld here) was refusing to initiate language learner programs when nearly 70 % of the student population was Latino, and many students clearly needed the interventions. I could see that he and I were not in the same place when it came to educating children! They, (higher level administrators and board members) don't really care what you think. They just want the job done according to their own precepts and ideas.

Analysis and Conclusion

I found evidence throughout the study that public servants, be they teachers, school or district administrators, or state-level administrators, feel they must operate with a *code of silence* about *social justice* issues in many professional settings. That is, they feel a need to keep to themselves when *critique* might be appropriate. I found that for the most part, except in trusting environments, *critique* is discouraged and sometimes even explicitly disallowed inside the circles of administrative discourse. On the other hand, *caring* and action with respect to individual *justice* are expected and rewarded. Over the past 30 years, there has been a shift away from the issues of "Inequalities in physical resources" (Noddings, 1992) and toward zero tolerance and assertive discipline measures (Thornburg, 2001). It can be legitimately argued, I think, that in San Joaquin as elsewhere in the United States, a "school-to-jail pipeline" (Advancement Project, 2011) has become operational as libertarian processes, competition, and privatization in many areas of education have come to dominate.

I found evidence that leaders do see the "school-to-jail pipeline." One of the administrators interviewed in this study remarked extemporaneously:

> "Assertive discipline did certainly invade California schools and became an integral part of not only how discipline was applied but how records were maintained statewide. … There weren't any districts that were allowed not to have Zero Tolerance Policies because of legislation that gave no choice." I asked if he saw any connection between assertive discipline and zero tolerance policies.
>
> "My assumption is that assertive discipline was in place for years, and I've been in education for thirty-two years, but, Zero Tolerance took assertive discipline to a much higher level. It legitimized it and institutionalized it with expensive in-service. You know, three strikes and you're out, green light, yellow light, red light, marbles in a jar, etc. and … if you look at what the results have been over the last fifteen years, I believe it's been disproportionally unfair to minorities. I've always believed in the more relationship orientated methods of discipline from Madeline Hunter and Fred Jones out of UCLA.
>
> He then went on to conclude: I believe that if you look at the past thirty years or so, you'll see that these (assertive discipline and zero tolerance) methods haven't worked! If a kid is checked out of the system, then putting a marble in a jar isn't going to change him!"

His comments echo the findings of a Harvard Civil Rights Study and other studies mentioned to interviewees (Ithaca College, 2012) – see on-line Charter Schools, Education Vouchers, and School Choice.

During the California On My Honor: Civics Institute for Teachers at the CA Office of the Courts, in San Francisco, many teachers openly discussed *social justice* issues. It was during that week of engagement that I personally began to believe that public servants, teachers, administrators, and even judges are constrained in the context of the postmodern world's use of social media and cable news. Early on, and during the process of collecting data at the institute, I contacted a powerful court official after a keynote address that focused on legitimate concerns with California budget constraints. The address to us an audience of civics teachers was heartfelt.

The speaker complained about the libertarian political forces in America and how "individualism" is constraining legitimate social services for the poor and for "at-risk" youth in our society. The speaker said that society seems to be losing a common civic purpose. The comments of this high court official parallel comments made by Watson (2012a) in her new book: *"current push-pull dynamic between capitalism and democracy"* … *"where "this country's democratic principles fuel rhetoric about equal opportunity … and,* as a "*contentious arena, --in K-12 schools-- where these ideologies (capitalism and democracy) collide*" (p. 3).

After the address, I spoke with the high court official and I asked if I might have permission to quote the statements made and explained that I would send a draft of my proposed quotes as I had written them down. Initially, there was an agreement.

However, when I sent the draft, I was asked not to quote the contents directly as ascribed to the court official. My interpretation of this exchange, early in the study, was that if a powerful state court official felt so constrained, then *silencing* was a concern that I needed to examine in this study.

I asked one educational leader directly what he thought about the questions of *critique* found in Starratt (1994) and if they'd have resonance with legislators, school boards, and other governmental officials, and he said, "*They don't care what we think! They just want us to manage, to follow the guidelines, the Education Code.*" This same leader then went on when I pressed him a little further about being *silenced* in a previous job he'd left before becoming a superintendent, where justice issues were at stake, "*I left, because I did speak up!*" As seen above, the interviewee clearly had a goal to achieve the learning objectives of the English language learner students he was concerned about; yet, apparently his boss, a former superintendent in the valley at the time, saw his students differently. His boss saw these farm worker students strictly from a "disciplinary" and control/enforcement perspective. Shortly thereafter, his former boss left education for the private sector. He joined a company that specializes in school safety through interdiction with drug sniffing dogs. When discussing *social justice* in the context of Rawls (1971) and Hayek (1976), he exclaimed, "*There isn't much equity and fairness in many parts of America. It's very disconcerting.*"

Another interviewee who works at the state level and occasionally sees legislators likewise demurred from *critique* questions; he'd made comments to legislators for which he'd been reprimanded by higher up state officials. He stressed the importance of *caring* through teaching for *resiliency* (Bernard, 2004) and the importance of *justice* by turning zero tolerance language on its head and carefully holding school districts to *all* aspects of educational code. *"Zero Tolerance means we must intervene with a viable alternative plan, not just suspend the student. Zero Tolerance means we don't accept the status quo, how we are educating the student"* he said. We shared several e-mail exchanges about my use of quotes and my interpretations from taped interviews. This procedure was a practice followed with all participants.

Another educational leader spoke about the difficulty in building trust with students in using *resiliency* strategies. She spoke about a negative experience with the Cesar Chavez state holiday where she'd personally experienced the difficulties students might have in challenging bullies. Then she expressed concern about the district's assertive discipline data system and its negative effects on her anti-bullying program. She explicitly asked to remain anonymous about her concern. She was fearful that her school program might be jeopardized by more powerful administrators known to use the data system as a device to move kids into alternative education.

At California's Third Annual Equity Summit, UC Davis (Watson, 2012b), the conference provided a climate that encouraged discourse and a *critical* perspective on "*larger social inequities"* (English, 1994, p. 15). I approached one of the keynote speakers at the conference, after she emphasized in her talk that minorities are underrepresented at higher levels of administration in the state of California. I briefly explained this research effort and she said to me, "Tell me a little about your study and what did you find?" I explained that I had asked questions of interviewees based on Starratt's (1994) thesis on *caring*, *justice,* and *critique,* and I said that I contend that all three constructs must work together to find *social justice*. I told her that alternative education students including incarcerated students had been the focus of the study. I explained that everyone interviewed seemed comfortable talking about *caring* for students in any context – libertarian, conservative, liberal, or progressive – and that everyone seemed to agree that *justice* or fairness, in terms of due process, was also important. When I mentioned that in my view, *critique* was absent or seemed to be discouraged and therefore *social justice* was discouraged, she quickly said, *"Nobody in educational administration wants to use* critique*, -Talk about critical issues!"* We both smiled and seemed to agree.

I sent an e-mail with a proposed quote. I was thanked for checking on accuracy, and it was clear from the response that the speaker needed to remain anonymous. As was the case with this Equity Summit speaker, all of the interviewees in this study are public servants they are all exceedingly cautious. I asked a former colleague who works for this person in alternative education, and he said, "One on one, a great person, a superintendent must play politics and image 95 % of the time." With our current political climate where powerful corporate interests and ALEC now undermine public education, and public servants in general, the advocates for *libertarianism* and the privatization of schools (Apple, 2001; Swalwell & Apple, 2011) in my view discourage any public pronouncements that might fit with Starratt's ethical *critique* questions. In the American postmodern world, I've noted that some political media outlets define *critique* – critical analysis – as "class warfare" and are dismissive of it.

According to studies, the typical school option for "at-risk" youth is a public alternative school, sometimes a prison school. Has the underlying political power shift in America toward *libertarianism* and the privatization of schools locked out opportunities for "at-risk" youth? Many *street-level bureaucrats* and some alternative schools work wonders against the odds (see JCCASAC), and other educators outside K-12 education for "at-risk" youth are leading the way (Watson, 2012a, b). In this study, a State of California Alternative Education consultant helps individual youth through counseling on his own time (Sackheim, 2009), and a new associate superintendent in Fresno (Tanner-McBrien & Tracz, 2011) has reduced the numbers of foster youth from being expelled. All have probably saved lives. I think ethical *street-level bureaucracy* is analogous to the work of Oskar Schindler in Poland during World War II. The question is as follows: Is this enough with America's extreme incarceration rates and the school-to-prison pipeline? Can the leadership imperatives as shown in the framework for this study (English, 1994; Rawls, 1971) be met? My conclusion is that when public school leaders are *silenced* and must resort to *street-level bureaucracy* to help overcome injustice, rather than feeling empowered to use dialogic discovery (Shields, 2004), then *social justice* becomes severely curtailed and is difficult to find.

Recognitions

This qualitative research project truly represents the spirit of "grounded theory" as the interviewees and others participated throughout. Each read drafts throughout and approved them before the final draft was submitted. My perceptions and choice of quotes were commented on, discussed, criticized, and eventually agreed on collectively by interviewees and other participants.

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Chapter 39
Living with the Legacy of Conquest and Culture: Social Justice Leadership in Education and the Indigenous Peoples of Australia and America

Bronwyn Fredericks, Priscilla Maynor, Nereda White, Fenwick W. English, and Lisa Catherine Ehrich

Introduction

Through the process of colonization, Indigenous peoples throughout the world witnessed the imposition of British and European worldviews, languages, legal and social structures, and lifestyle: in fact, over all areas of life. By means of domination and oppression, it also imposed derogatory labels on Indigenous peoples such as "uncivilized," "inferior," and "immoral" (Henderson, 2000; Memmi, 1967). Through language usage and colonial processes, the British and the Europeans were imbued with a spurious sense of superiority over the rest of the world (Henderson, 2000; Sawchuck, 1992) resulting in a discourse in which Aboriginal Australians and Native American Indians became the "Other." Everything and everyone else in this process became subordinate to Britain and Europe: culturally, economically, and politically. This was repeated through exclusionary language and privileging difference.

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In the making of modern Australia and the USA, Indigenous peoples have survived the most inhumane acts and violations against them, and despite acts of genocide, Aboriginal Australians and Native Americans have survived. It is the historical process of colonization that binds and connects Australian Aboriginal peoples in the same way as it does for Native Americans in the USA. Colonization and ongoing struggles are entrenched within Indigenous people's lives in both countries. The experiences and stories that are shared through the generations demonstrate that the legacy of colonization is still part of the everyday reality for thousands of Indigenous people. The impact of the past 500 years cannot be separated from understandings of education for Native Americans in the same way that the impact of the past 220 years cannot be separated from the understandings of Australian Aboriginal people's experiences of education. Indigenous people in other geographic areas of the world also have their own experiences of education and are linked through a larger project of conquest, imperialism, and colonialism (e.g., people in Mexico, parts of South America and Africa along with Canada, New Zealand, and other areas). This chapter, though, is specifically about comparisons in Aboriginal and Native American communities and their collision with the dominant, white European settlers who came to Australia and America. Moreover, it will highlight important leadership considerations in education in these contemporary times.

Noam Chomsky (1987) once remarked that if one took two historical events and compared them for similarities and differences, you would find both. The real test was whether on the similarities they were significant. The position of the coauthors of this chapter is in the affirmative and we take this occasion to lay them out for analysis and review. The chapter begins with a discussion of the historical legacy of oppression and colonization impacting upon Indigenous peoples in Australia and in the USA, followed by a discussion of the plight of Indigenous children in a specific state in America. Through the lens of *social justice*, we then examine those issues and attitudes that continue to subjugate Indigenous peoples in the economic and educational systems of both nations. The final part of the chapter identifies some implications for school leadership. It is important to note that with reference to the Australian story, the term "Indigenous" will be used to refer to two Indigenous groups, Australian Aboriginal people who have never ceded sovereignty over the Australian mainland and the Torres Strait Islander people who maintain their sovereignty in the islands between the northern tip of Australia and Papua New Guinea. These groups have separate and distinct histories and cultures and many Torres Strait Islanders now live in mainland Australia. The following section will relate mostly to Australian Aboriginal people.

Historical Legacy of Oppression and Colonization in Australia

Prior to 1788, Aboriginal people had a generally good lifestyle and health status (Saggers & Gray, 1991). Indeed, Thomson claims that when Australia was invaded by the British in 1788, Aboriginal people were "physically, socially and emotionally healthier than most Europeans of that time" (Thomson, 1984, p. 939). Aboriginal people lived in family and clan groups within clearly defined borders. The Aboriginal map of Australia (Horton, 1999) provides some indication of the boundaries of the various Aboriginal nations that had occupied the continent before the coming of the "white men." There were over 250–300 different languages spoken with approximately 600–700 dialects (Australian Institute of Aboriginal and Torres Strait Islander Studies [AIATSIS], 1994). Life was framed around complex spiritual, kinship, and social systems that ensured that each individual knew his or her place in the group, the rules for living, and their relationship with each other, the birds and animals, and the environment. For Aboriginal people who occupied mainland Australia and the nearby islands, this framework would have been known by numerous names dependent on the language of the speaker. The Pitjantjatjara desert peoples call it Tjukurrpa, the people in the Kimberley region refer to it as Ngarrankrni, and the Anmatyerre from the Northern Territory know it as the Altyerre. In contemporary Australia, it has more commonly been referred to as "The Dreaming."

Although numerous groups of "explorers" had ventured to Australian shores and the Aboriginal people of North Australia had had many years of contact and trade with the Macassans, English seaman James Cook claimed "discovery" in 1770 and annexed the land for Britain under the claim of terra nullius (meaning empty land) (Blainey, 1994). This critical act set the scene for the denial of Aboriginal land, the first act of injustice, and the struggle for human rights. The first "settlers" arrived in 1788 and began their systematic occupation of the country that had previously been the home of Aboriginal people for at least 70,000 or more years (Naik, 2011).

When the British invaded their land, life for Aboriginal people changed forever. At first some groups of Aboriginal people welcomed the newcomers as returned ancestors (due to the paleness of their skin) (Miller, 1985). However, it soon became clear that the invaders were only interested in possessing the land as a commodity for farming and the resettlement of convicts. Inevitably, clashes broke out between the colonizers and Aboriginal people due to struggles over land, Aboriginal women, and reprisals from both sides. To make way for farming, Aboriginal groups were pushed back from their traditional hunting and ceremonial grounds and camping and watering places. The introduction of hoofed animals such as sheep created squabbles when they were taken by Aboriginal people intent on feeding their families. These actions often followed violent reprisals by local farmers who massacred whole groups of men, women, and children. Aboriginal groups also sought revenge for these acts by killing shepherds and homesteaders. The frontier conflict was bloody and loss of life was extensive on both sides, but more so for Aboriginal people who lacked the weaponry of colonials. Many tribal groups were decimated by the massacres and deliberate poisoning of flour and waterholes and also because of their lack of immunity to introduced diseases such as smallpox, influenza venereal disease, typhoid, tuberculosis, pneumonia, measles, and whooping cough. As a result of the impacts of colonization, the health of Aboriginal peoples dropped from generally good to very poor (Fredericks, Adams, & Edwards, 2011; Miller, 1985).

In a move to quell the "Native uprisings" and to gain better control over the European settlements, in the late nineteenth century, government introduced

Protection laws to save what was portrayed as “a dying race” (Evans, Cronin, & Saunders, 1975). Under Protection, Aboriginal people were rounded up and herded on to areas of land termed “missions” or “reserves.” These were located far from their traditional lands and often in desolate spots far from the sight of “civilized” society. Generally the missions were run by government officials and agencies or by missionaries from different church groups, and life was extremely hard (Huggins & Huggins, 1996; National Library of Australia [NLA], 2006; Rintoul, 1993). Instead of the previously healthy diet of bush tucker, the people were given rations of salted meat, tea, sugar, flour, salt, and porridge (Mellor & Haebich, 2002; NLA, 2006; Rintoul, 1993). Housing on the missions was little more than shacks, and there was limited access to medical supplies and treatment resulting in extremely poor health and early deaths. The children were generally separated from their parents and housed in separate dormitories for boys and girls. While others were sent away to be raised in institutions such as the Cootamundra Domestic Training Home for Aboriginal Girls which was operated by the Aborigines Welfare Board from 1911 to 1968 (Bird, 1998; Haebich, 2000; Human Rights and Equal Opportunity Commission [HREOC], 1997; Mellor & Haebich, 2002).

The speaking of Aboriginal languages and cultural practices was forbidden making it difficult to pass on history, language, stories, art, dance, customs, marriage, healing, and spiritual practices (Huggins & Huggins, 1996; NLA, 2006). In some cases Aboriginal people were put in solitary confinement for speaking their language (Rintoul, 1993). All aspects of life including who married whom and when, travel on and off the mission, the type of education each person received, or the job they did were controlled and supervised by the Mission Manager and the Office of the “Protector” (Kidd, 2003; Rintoul, 1993). Aboriginal people could apply for exemptions if they were willing to embrace a European lifestyle and reject their heritage and language and not associate with any other Aboriginal people (this included family members). These exemption certificates were referred to by Aboriginal people as “dog tags” or “dog licenses.” The above-described restrictions remained in place until 1969 when Protection Boards were disbanded and the Commonwealth assumed responsibility for Indigenous affairs.

Education on the missions in most cases was provided by poorly trained teachers. Generally, Aboriginal children were not educated beyond Year 4 since it was believed that Aborigines were “inferior in intelligence.” This conclusion had previously been drawn from scientific testing including the measurement of skull size. Additionally, further education was considered a waste since most were being groomed for lives of servitude. At the age of around 13 or 14, they were also sent out to work – the girls were given placements on cattle/sheep stations or as maids in the domestic households of white families; the boys were indentured as farm laborers or as stockmen on cattle stations (Bird, 1998; HREOC, 1997; Huggins & Huggins, 1996; Mellor & Haebich, 2002). The purpose of these placements was to segregate “part-Aboriginal” children from their families and to assimilate them into the mainstream community. They were not allowed to remain in any contact with their families with all forms of communication controlled by their supervisors and “bosses.” Both white men and women were party to this form of control and subjugation of Aboriginal people. The stories recounted by Aboriginal people of their experiences tell a tale of harsh treatment and physical, emotional, and sometimes sexual abuse (Blake, 2001; Kidd, 2003).

In the majority of these situations, Aboriginal people received little or no pay. They mostly received the equivalent of pocket money and it was claimed that their major earnings were being sent back to support their families remaining on the missions under a "settlement maintenance levy" (Blake, 2001; Kidd, 2003). These wages were later determined to be "stolen" as they never reached their families and were used by the authorities to undertake development and build hospitals and other infrastructure for the general population (Blake; Kidd). These stolen wages have been the subject of class actions against governments and ongoing tensions between the descendents of past Aboriginal workers and the current governments in Australia.

This impact of "living under the Act" has had far-reaching consequences for Aboriginal people. Substantive scholarship has linked this period to the current poor positioning of Indigenous people in Australian society and the disadvantage that they face in all areas of life as well as the poor regard they experienced from the majority of Australians (Aboriginal and Torres Strait Women's Taskforce into Domestic Violence, 2000; Blake, 2001; Herbert, 2003; White, 2007). Today, Aboriginal people still recount stories of living under the Act and the discrimination and hardships they experienced (Huggins & Huggins, 1996; Mellor & Haebich 2002; NLA, 2006; Rintoul, 1993).

In 1967, the Australian people voted in a referendum to allow Aboriginal and Torres Strait Islander people citizenship entitling them to the same rights and responsibilities as other Australians (Evans et al., 1975). This historic landmark was intended to give Australia's Indigenous people the opportunities to participate more fully in Australian society. However, legally, Aboriginal people were still excluded from the Constitution and their welfare remained grossly neglected. Many Aboriginal people were living in missions that were now called reserves or communities or other names. Education remained inadequate and provided little preparation for working and living in Australian society.

However, from the 1970s in line with the international focus on multiculturalism, there were initiatives introduced to encourage greater participation by Indigenous people at all levels of education. These included the establishment of university-based student support centers or enclaves, the introduction of Indigenous financial support payments called "Abstudy" which was designed to assist with the financial costs of studying at secondary and tertiary levels (similar to other forms of financial assistance available to other Australian students), and various parent and community engagement programs. In 1991, the *National Aboriginal and Torres Strait Islander Education Policy* (NATSIEP) (MCEETYA) (1995) was endorsed by federal, state, and territorial governments. The NATSIEP provided some measure of success in addressing the educational disadvantage through its 21 goals and strategies directly focused on improving access, participation, and educational outcomes for Indigenous students. It not only focused on curriculum but also addressed issues of teacher training, the employment and training of Indigenous teachers and workers, and participation of Indigenous people including parents in educational decision making. However, despite all of these introduced measures, there is little evidence to demonstrate that over the past 20 years, there has been significant change in the educational achievements of Indigenous students when compared with non-Indigenous students (see also Greer and Dempster in Chap. 23, this volume). This has also been witnessed in other parts of the world. It is to America to which this chapter will now turn to understand the experiences of Indigenous people in the USA.

Historical Legacy of Oppression and Colonization in the USA

In the Americas (North, Central, and South), there had been a 500-year period of violent confrontation with Indigenous peoples beginning with the voyage of Christopher Columbus who "discovered" the "New World" in 1492. As Thornton (1987) observed, this "fact" is wrong since "the Vikings had preceded him by 500 years" and "the first human beings to arrive—the ancestors of the American Indians, Eskimos, and Aleuts living on the continent when Columbus arrived—had preceded him by thousands and thousands of years" (Thornton, p. xv).

The devastation which occurred was nothing less than a holocaust for Indigenous people. The first that consumed North American Indians were the fevers brought on by newly encountered disease, the flashes of settlers' and soldiers' guns, the ravages of "firewater," and the flames of villages and fields burned by the scorched-earth policy of vengeful Euro-Americans. The effect of this holocaust of North American Indians like that of the Jews was millions of deaths. In fact, the holocaust of the North American tribes was, in a way, even more destructive than that of the Jews, since many American Indian peoples became extinct (Thornton, 1987, pp. xv–xvi).

Perhaps the most often recorded clashes between Euro-Americans and the Indigenous people of the USA were with the plains Indians, many of whom had domesticated horses left by the Spanish Conquistadors. These tribes (Nez Perce, Cheyenne, Sioux, Assiniboine, Plains Cree, Arapaho, Kiowa, and Comanche (McNab, 2010, p. 89)) had developed into a full-blown horse warrior cultures replete with modern guns obtained through trade or battle (Donovan, 2008). The ferocity of these pitched battles between the ever-encroaching white settlers on Indian lands and the resistance of those warrior cultures to that infiltration was as savage and pitiless as any modern battle in the twentieth century. The Indians were fighting for their land, their culture, and their very survival. Mercy was in short supply. Both sides took part in ambushes and peace treaty talk, in fact hundreds of them, most of which were soon broken by the US government. Women and children were routinely slaughtered on both sides with the unfortunate remark by US Army General Philip Sheridan that "The only good Indians I ever saw were dead" and which later became the infamous slogan, "The only good Indian is a dead Indian" (Donovan, p. 18).

Of the many wars between the Indians and whites, only one was ever won by the Indians, and the peace that followed proved to be short (Donovan, 2008, p. 28). These violent clashes, the stuff of Hollywood film lore for decades, rarely showed how one-sided it really was:

> As the Iroquois, the Shawnee, and the Arapaho would eventually all discover, the white man's superior technology, hunger for land, and ethnocentrism seemingly knew no bounds. The white threat to Indians came in many forms: smallpox, missionaries, Conestoga wagons, barbed wire, and smoking locomotives. And in the end, it came in the form of schools. (Adams, 1995, p. 5)

As with Indigenous children in Australia, the education of Native American children by white authorities was first performed by Christian missionaries near Indian reservations. Reservations were places of land earmarked for the resettlement of Native Americans so their hunting lands could be confiscated by white settlers for farming or mining. In 1870, the US Congress officially budgeted funds for education of Indians through the Office of Indian Affairs (Perdue & Green, 2010). However, these were only partially successful until a former Army officer, Richard Henry Pratt, opened the first off-reservation Indian boarding school in Carlisle, Pennsylvania. Pratt's motto for Indian education, which became the official "philosophy" for all 88 boarding schools by 1901, was a chilling "Kill the Indian, save the man" (Perdue & Green, p. 82). The horrors of the boarding school experience have recently surfaced in many books with titles such as *Education for Extinction* (Adams, 1995), *Genocide of the Mind* (Moore, 2003), and *Kill the Indian, Save the Man* (Churchill, 2004).

Five generations of Native Americans (1880–1980) endured the boarding school experience where tribal customs, language, and culture were ruthlessly attacked and conscious attempts made to erase their cultural heritage and language. Coleman (1993) quotes Indian Commissioner Thomas Morgan on the approach:

> It is of prime importance that a fervent patriotism be awakened in [the children's] minds… They should be taught to look upon America as their home and the United States government as their friend and benefactor…They should hear little or nothing of the 'wrongs [done] to the Indians,' and of the injustice of the white race. If their unhappy history is alluded to it should be to contrast it with the better future that is within their grasp. (p. x)

Young people in the boarding schools were subjected to their captors' "discipline" which included outright torture as well as sexual predation. As George Tinker, a descendent of the Osage Nation (2004), observes, "At some [boarding schools] it appears that every student, without exception, was raped, many of them regularly, over periods of years" (p. xviii). A report completed in for the time period 1933–1945 and which involved visitations of 64 of the then 78 boarding schools found that "the federal government neglected to provide Native children with even the most basic necessities in schools where they resided. The survey staff discovered that the average per capita food allowance in government schools amounted to 11 cents a day, and children suffered from malnutrition and actual shortages of food" (Child, 1998, p. 32).

What emerged as a consequence of the off-reservation boarding school was that about half of the children forced to attend them did not physically survive their experience (Tinker, 2004, p. xviii). The remainder developed a syndrome of problems which were "a complex and intractable blend of devastated self-concept and self-esteem, psychic numbness, chronic anxiety, insecurity and depression" which "goes far towards accounting for the endemic alcoholism, catastrophic suicide rates, pervasive domestic violence and a host of related maladies with which Native

North America has been afflicted, in some ways increasingly so, for the past century or more" (Tinker, p. xix). These indeed are the equivalent of America's "lost generations" though there never has been an apology by any US President to them for an official genocide-specific policy defined and funded by the US government over the decades.

This lies in contrast to a recent event in Australian history when Kevin Rudd (2008), the then Prime Minister of Australia in 2008, apologized to the nation's Indigenous peoples for the Commonwealth's discriminatory policy of forcibly removing Aboriginal children from their families and placing them in state care (HREOC, 1997). The Apology to the "Stolen Generations" was acknowledged by many Indigenous and non-Indigenous Australians (but not all) as an important step in healing and reconciliation (see Behrendt, 2008; Fredericks, 2010a; Gunstone, 2007; Hollinsworth, 2007; Manne, 2001).

Historically, then, there have been parallels in the treatment of Indigenous peoples by respective US and Australian governments. In 1819, the US government assumed the formal responsibility of educating Native Americans as US subjects. In 1873 the duties of Indian education were shifted from the War Department to the Department of the Interior. The actual objective of Indian education was to erase the effect of their culture and to assimilate them into the mainstream.

According to Lomawaima (1999), the pillars of education for Native Americans were predicated on four tenets: (1) Indians were savages who had to be tamed, that is, "civilized"; (2) "civilization" required conversion to Christianity; (3) Indian cities or settlements had to be broken up and resettled to further break the strength of the hold of a "savage culture"; and (4) Indians had mental, moral, physical, and cultural "deficiencies" that made certain pedagogical methods mandatory for their education (p. 3).

The school curriculum for Native Americans was based on the tenets that they were "savages" of limited ability and intelligence and therefore required academic subjects to be taught via manual training. Indians learned to speak English by doing chores. "History became…a lesson about racial progress…Teachers unfavorably compared the Indian past to contemporary Euro-American culture" (Perdue & Green, 2010, p. 84). Girls were trained to become cooks and nurses and "to return to their communities, marry educated men, and become role models for other Native women" (Perdue & Green, p. 85).

Education policies consisted of replacing the use of Native languages with English, destroying Native American customs, and teaching allegiance to the US government (Spring, 2001, p. 28). Boarding schools became the tool for accomplishing this, and through boarding schools experiences, generations of American Indian children separated from their parents, extended families, and tribal communities lost exposure to traditional Native cultures, languages, and values (Butterfield & Pepper, 1991; Demmert, 2001; Deyhle & Swisher, 1997; Lomawaima, 1999).

The American government's strategy of erasing Indian culture was disastrous to Native Americans. In the report titled *The Problem of Indian Administration* (Institute of Government Research) also known as the *Meriam Report* (1928) (Institute of Government Research), the specific failures of educating Native

Americans were identified. One of the causes was not only that Indians were specifically excluded from managing their own affairs but that they were receiving a very poor quality of both education and health services. Still, not much changed after this report for nearly 70 years later, the United States Senate (1969) released a report called *Indian Education: A National Tragedy—A National Challenge.* This report was a blistering condemnation of government policies:

> At the heart of the matter, educationally at least, is the relationship between the Indian community and the public school and the general powerlessness that the Indian feels in regard to the education of his children. This relationship frequently demeans Indians, destroys their self-respect and self-confidence, develops or encourages apathy and a sense of alienation from the educational process, and deprives them of an opportunity to develop the ability and experience to control their own affairs through participation in effective local government. (p. 24)

To this day, some 40 years later, the condemnations and shortcomings of education for Native Americans in the USA remain a continuing legend of cultural marginalization (see Maynor, 2011). In the words of Agoyo (cited in Sando & Agoyo, 2005), a Tewa Native American in New Mexico:

> As I stand and look back years away from that time, I have come to the conclusion that it was not the lack of substantial educational opportunities that was most detrimental; rather, it was the fact that all that schooling taught me many things of the world but nothing of myself or my people and our history. I learned about the causes of the American Revolutionary War and all the wars between then and now. I learned about Plato, ancient Greece, and the rise and fall of the Roman Empire, but not one word was ever spoken of the great leader of the Pueblo Revolt of 1680, Po'pay. In fact, even the Pueblo Revolt itself has been merely a footnote in most history. (p. xii)

The next section considers the specifics of the educational disadvantages faced by Indigenous students in both countries, starting with Australia.

Educational Disadvantage and Indigenous Students in Australia

In 2007, the Close the Gap Coalition presented the Australian government and the major political party in Opposition with a set of National Indigenous Health Equality Targets to address the 17-year life expectancy gap between Indigenous and non-Indigenous Australians (National Aboriginal Community Controlled Health Organisation and Oxfam, 2007). The Close the Gap campaign called on Australian governments to take action to achieve health equality for Aboriginal and Torres Strait Islander peoples. The Coalition of Australian Governments (COAG) launched a Close the Gap campaign in March 2008. It was the first time a coordinated, multi-sector strategic approach was put forward to addressing the poor health and disadvantages experienced by Indigenous Australians. The COAG documents coupled with the NACCO and Oxfam document require a commitment across all levels of government to address the inequities and work toward "Closing the Gap." The expression "Close the Gap" has now come to be used in the Indigenous policy discourse to refer to the need to redress the disparity in health, employment, housing, community safety and security, justice, community development, training and education outcomes, and many other areas that influence the health and well-being of Indigenous peoples (Fredericks, Lee, Adams, & Mahoney, 2011). However, despite the efforts and billions of dollars focusing on improving the status of Indigenous Australians, the Overcoming Indigenous Disadvantage Key Indicators 2011 (Steering Committee for the Review of Government Service Provision (SCRGSP)) continues to reflect the disadvantages that limit Indigenous opportunities and choices. Across virtually all indicators in this report, there are wide gaps in outcomes between Indigenous and other Australians. The report shows that the challenge is not impossible – in a few areas, the gaps are narrowing. However, many indicators show that outcomes are not improving, and that some are even deteriorating. There is still a considerable way to go to achieve the Council of Australian Governments' (COAG) commitment to Closing the Gap in Indigenous disadvantage (HREOC 2008).

The report (Steering Committee for the Review of Government Service Provision [SCRGSP], 2011) found that outcomes have improved in several areas. In those jurisdictions with long-term data, the mortality rate for Indigenous people declined by 27 % between 1991 and 2009, leading to a narrowing (but not closing) of the gap with non-Indigenous people in those jurisdictions. Indigenous young child (0–4 years) and infant (0–12 months) mortality rates declined by over 45 % between 1991 and 2009 (for Western Australia, South Australia, and the Northern Territory). More Indigenous people are home owners, and Indigenous people are achieving better outcomes in post-secondary education with approximately 10,000 Indigenous students enrolled in universities across the country (SCRGSP). Both employment and income have also improved. However, it was noted that outcomes in these areas have also improved for non-Indigenous people, leading to little or no closing of the gaps. In other areas, there has been little change in literacy and numeracy and most health indicators and overcrowding in housing has not improved. Of serious concern is that the rates of child abuse and neglect substantiations and adult imprisonments have increased for Indigenous people. There has been some improvement in juvenile detention rates (SCRGSP).

Some of the specific illustrations of the disparity between Indigenous and non-Indigenous Australians in regard to educational outcomes are included below:

- Indigenous students are less likely to have achieved the Year 7 and Year 9 reading, writing, and numeracy minimum standards (in 2009, 20–30 % points lower than for non-Indigenous students).
- Indigenous students are far less likely to remain in school to Year 12 with a retention rate of 45 % compared to 77 % for non-Indigenous Australians.
- Indigenous students are less likely to be studying for a qualification than all young people (41 % compared with 58 % for 15–24-year-olds in 2008).
- Indigenous students are almost half as likely as all young people aged 18–24 years to be participating fully in education or employment (40 % compared to 77 %).
- Indigenous students are twice as likely to be unemployed as all young people aged 15–24 (26.5 and 11.5 %).

(Australian Institute of Health and Welfare, 2011, pp. 128–134)

In 2008, the Council of Australian Governments agreed to a set of six targets to close the gap and reduce disadvantage among Indigenous Australians. These are:

- Closing the life expectancy gap within a generation
- Halving the gap in mortality rates for Indigenous children within a decade
- Ensuring all Indigenous 4-year-olds in remote communities have access to early childhood education within 5 years
- Halving the gap for Indigenous students in reading, writing, and numeracy within a decade
- Halving the gap for Indigenous children in Year 12 attainment
- Halving the gap in employment levels within a decade

(COAG, 2009)

What the above demonstrates is that there has been a long history of failed government policies and practices that have led to little improvements in the life chances of Indigenous children (see also Greer and Dempster in Chap. 23, in this volume). The next section considers educational disadvantage faced by Native American students in the USA.

Educational Disadvantage and Native American Students

In the USA, there are 562 tribes federally recognized as sovereign nations, both legally and politically. Many other Indigenous communities are identified tribes or tribal entities by their respective states. According to the US Census, 2000,[1] a total of 4.3 million US citizens identified themselves as having American Indian and Alaska Native ancestry. The National Center for Education Statistics (2005) reported that 624,000 American Indian and Alaska Native students are educated in the nation's K-12 system. The majority of these students attend public schools while approximately 7 % attend schools administered by the US Bureau of Indian Education (BIE). In both educational settings, educational outcomes for American Indian students are inadequate, which negatively impacts Native communities culturally, socially, and economically. American Indian students drop out of high school in unprecedented numbers in comparison to their peers. The high school completion rate for Native Americans was 54 % compared to a national rate of 72 and 78.4 % for white students in 2008 (Diplomas Count, 2011). Other disparities in educational outcome include:

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[1] "American Indian," as defined by the US Census, is a person having origins in any of the original peoples of North and South America and who maintain tribal affiliation or community attachment. The terms *American Indian* and *Native American* are used interchangeably to avoid repetition.

The inclusion of and reference to *American Indian and Alaska Native* are based upon the unique legal relationship with Indian tribes and a special relationship with Alaska Native entities as provided in the Constitution of the USA, treaties, and federal statute.

Beginning in 2006, Bureau of Indian Affairs schools are called Bureau of Indian Education (BIE) schools.

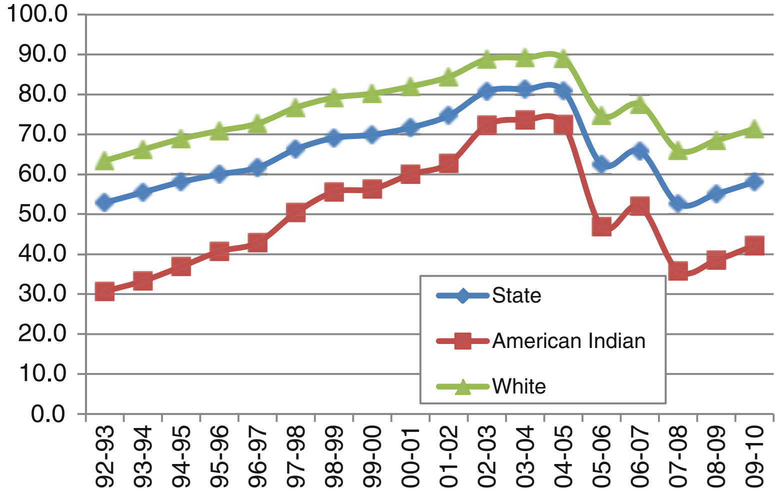

Fig. 39.1 1992–1993 to 2009–2010 End-of-Grade Test results statewide percent of students at or above Level III proficiency in both mathematics and reading, grades 3–8, for American Indian and white subgroups (Source: North Carolina Department of Public Instruction, Division of Accountability Services)

- Significantly lower reading and math scores in grades 4 and 8 for American Indian and Alaska Native students in comparison to non-Native students (National Center for Education Statistics, 2009).
- Higher percentages of American Indians and Alaska Natives receive special education services in comparison to their non-Native peers.
- Fewer American Indians and Alaska Native students participate in the Advanced Placement exams.

The greatest threat to Native communities' culture, language, and identity, however, is the social indicators such as poverty, suicide, teen birth, and substance abuse rates for Native Americans which exceed the national average.

An Illustration of Educational Disadvantage: The Case of North Carolina

The educational outcomes for American Indian students in North Carolina mirror the national trends and statistics. For the past 18 years, American Indians in North Carolina have consistently scored below the state and white student populations. Figure 39.1 illustrates this pattern as reflected in the statewide percent of students at or above Level III proficiency in both reading and mathematics, 1992–1993 to 2009–2010.

Maynor (2011) further explored the academic proficiency for a cohort of American Indian students, specifically those from economically disadvantaged backgrounds, entering third grade in 1998 and examined their progression through the state's public schools through 2007. The examination included a look at the college retention for those in the cohort entering a higher education institution in the state's public university system following graduation from high school. Findings clearly indicate that public schools in North Carolina have not made a positive, significant difference in the educational achievement patterns in reading, math, and high school. American Indian students from economically disadvantaged backgrounds faired the worst. American Indian students who were from lower socioeconomic backgrounds tended to be non-proficient at a higher rate than those who were from higher socioeconomic backgrounds. The density of a school district in terms of the percentage of American Indian students it enrolled made little difference in the proficiency of the lower socioeconomic students in attendance. Without question, the examination of North Carolina's proficiency patterns for the state's American Indian students clearly illustrates the reproduction of educational inequalities.

To describe this occurrence, Maynor (2011) used Bourdieu's (1984) concept of *habitus* to explain how individuals internalize their objective chances of succeeding based on their economic and cultural background, as well as what is common for their social class. School "reinforces rather than redistributes the unequal distribution of cultural capital" (Swartz, 1997, p. 191) and "deflects attention from and contributes to the misrecognition of its social reproduction function" (p. 191). Schools "privilege certain cultural heritages" (Swartz, p. 199) and exclude others, such as in this case the cultural values of American Indians. Instead, the cultural values of middle-class families are accepted and rewarded by schools. Because most American Indian students often come from lower income backgrounds, they are placed at a disadvantage. Middle-class families tend to employ resources and capital to improve their students' academic trajectories. However, lower-status American Indian families lack the cultural capital or resources to pursue such options.

Success in school, as Bourdieu (1994) argues, is determined by the amount and type of cultural capital inherited from families rather than by measures of individual talent or achievement. This strongly implies American Indian students from more privileged home environments have acquired throughout their childhood patterns of thought and behaviors consistent with the dominant values schools expect. To the contrary, American Indian students from disadvantaged backgrounds, as Maynor concluded, start with a disadvantage that contributed to higher rates of non-proficiency.

The results in Figs. 39.2 and 39.3 illustrate that from 1998 to 2007 American Indian students from higher socioeconomic backgrounds consistently reflected greater mean proficiencies than students of lower socioeconomic backgrounds. Lower enrollments in the last year of high school led to the only exception in the pattern, which show greater proficiency for lower socioeconomic status (SES) students. Overall, the proficiency of lower-SES students is significantly lower than those of higher SES and suggests that Bourdieu's theoretical framework of *habitus* is

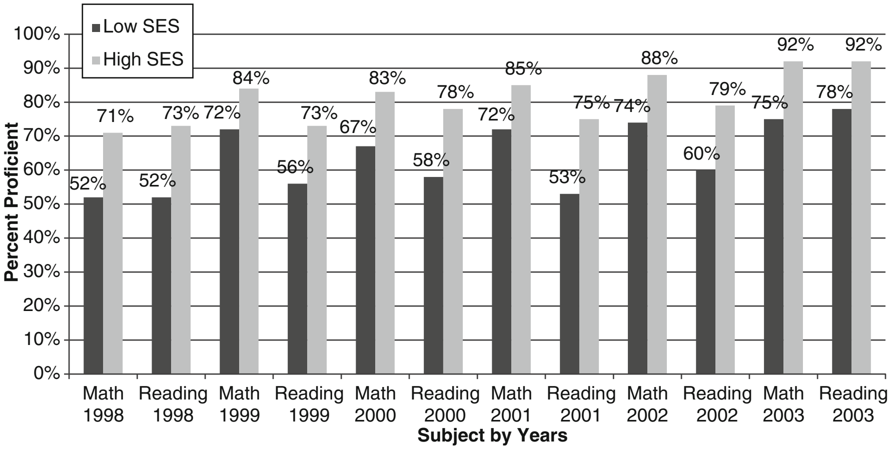

Fig. 39.2 Percent proficiency on math and reading for American Indian students 1998–2003 for low vs. high SES

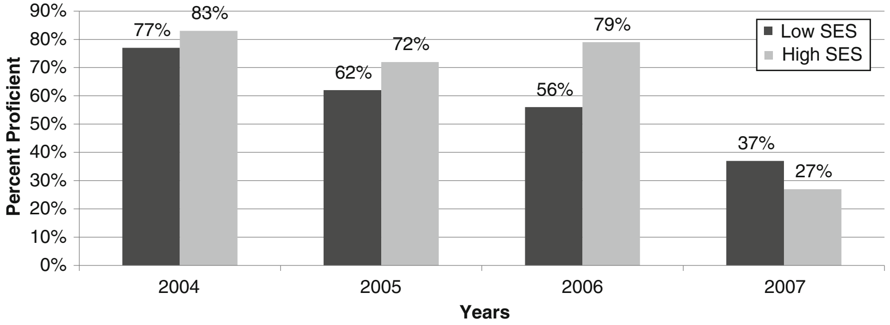

Fig. 39.3 Percent proficiency of high-school American Indian students 2004–2007 for low vs. high SES

supported, that is, "the habitus is the source of 'objective' practices, but is itself a set of 'subjective' generative principles produced by the 'objective' patterns of social life" (Jenkins, 2002, p. 82). As hypothesized, higher-SES American Indian students showed higher rates of academic proficiency on standardized math, reading, and high-school assessments than students from lower-SES backgrounds.

Socioeconomic status is defined by a student's eligibility for free or for a reduced lunch (FRL) in the National School Lunch Program and is used as the indicator for economic disadvantaged. The eligibility status is often used as a proxy for a student's socioeconomic status. Students from families with incomes at or below 130 % of the poverty level are eligible for free meals, and those with incomes between 130 and 185 % of the poverty level are eligible for reduced-price meals (Siren, 2005). Eligibility for school-lunch programs is one of the most

Table 39.1 Chi-square test on freshman retention in institutions of the UNC System

Variable	Retained in Year 2	Not retained in Year 2	Total	χ^2	p
				4.53	0.030
American Indian students	195 (73.3)	71 (26.6)	266 (100)		
Non-American Indian students	18,458 (81.9)	4,051 (18.1)	22,509 (100)		

Note: df = 1, values in parenthesis are percentages

commonly used SES measures in the current literature on academic achievement (Siren) which is why we have also used it within this chapter.

Additional supporting evidence, according to Maynor (2011), reflects a significant difference in the freshman retention rates of American Indians compared to their peers. American Indian students enrolled in North Carolina's public university system as freshman following graduation from high school experienced a lower reenrollment rate than non-American Indian students. According to University of North Carolina records, a total of 22,775 students entered the university system. The total number of students who identified as American Indian were 266. Eighty-two percent of the non-American Indian student population returned for a second year in fall 2008. As Table 39.1 shows, the percentage of American Indian students returning was 73.3 (195 out of the 266 American Indian students). This reveals a dropout rate of 27 % compared to 18 % for non-American Indian students. The percentage of non-American Indian students returning was 82 %.

When modeled alone, SES and percent proficient were both significant predictors of freshman retention, meaning that as the students tended toward high SES or proficiency, they were more likely to be retained. Density was not a significant predictor of freshman retention. When the significant, independent variables were entered as simultaneous predictors, the only variable found to be significant was SES. As the students tended toward high SES, they were more likely to be retained. Therefore, SES and proficiency were both significant predictors of freshman retention. However, SES was the strongest predictor of freshman retention for American Indian students.

The aforementioned discussion has highlighted the disparities in educational achievement between Native American Indian students and non-Native American Indian students. It also raises a question about the effectiveness of education reforms in improving Native American and Alaska Native education. With the passage of the Indian Education Act, by the late twentieth century, American Indians were granted authority to engage more in the education process.

Since this time, some progress was made but is credited to the persistence of American Indian educators and parents continually fighting for equal access to education and proper federal support for programs to meet the unique cultural needs of American Indian students. In the midst of governmental reform initiatives and discourse, the Native American voice is marginalized, if not unnoticed. Brayboy and Castagno (2009) explain by stating that education, like in the past, is "framed and lived within a framework where larger assimilative forces and local, Indigenous forces are engaging in a "battle for power"" (p. 32). The present "battle for power" confronting Native Americans, albeit less overt than practices of the past, are assimilative processes masked as accountability, standardized testing, and a recent movement toward common core standards.

For example, the most notable federal education reform initiative in the USA, *No Child Left Behind Act of 2001-Public Law 107–110* (NCLB), is lauded for its noble intent of ensuring all American students regardless of race, ethnicity, or income achieve at high standards. Yet, NCLB has not succeeded. The policy has received significant criticism from Native communities and opponents who argue it has negatively impacted Native American children and educators and presents little evidence of significant differences in the instructional practices and education achievement for Native students (Beaulieu, 2008; McCarty, 2008; Watanabe, 2008; Winstead, Lawrence, Brantmeier, & Frey, 2008). According to Beaulieu, the reform has served to "diminish almost entirely the role of Native languages and cultures in schools with Native students and to revert federal Indian education policy to a time prior to the Meriam Report 1928" (p. 32). Similar sentiment emerged from Native American communities in eleven hearings convened across the USA:

> Upon the enactment of the Federal No Child Left Behind Act, parents and tribal leaders breathed a sigh of relief that finally someone will notice what is happening to our children. We applauded the attempt at system accountability. All of a sudden, school administrators; teachers and state education agencies were recognizing the serious state of neglect in the education of our Indian children. On the surface, the goal of the No Child Left Behind seemed a worthy one. Unfortunately, the approach dictated by the law has created serious negative consequences. Instead, it has become our children who are being held accountable for something that is out of their control. Schools are sending the message that, if our children would just work harder, they would succeed without recognizing their own system failures. Indian children are internalizing the system failures as their personal failure. Their rights exuberating the shame and guilt.

In 2011, the current US Secretary of Education, Arne Duncan, described NCLB as "far too punitive, far too prescriptive, and filled with perverse incentives" (Meckler and Banchero. A2).

Implications of Unequal Cultural Capital for Indigenous Australians and American Indian Students

The historical context of Indigenous Australians and American Indians and their educational experience is an unquestionable tragic story of how dominant cultures and dominant government policies have led to the destruction of traditional ways of life. Under the cloak of imperialism, colonization, and progress by either colonial rule, governments, or secular or religious agencies, in both overt and covert ways, Indigenous peoples from both nations were forced to marginalize or erase their cultural ways of being for those of the dominant culture. The motive underlying the powerful resistance experienced by Native Americans, from the past and present, comes from the demands of the respective education systems to maintain the preexisting social order, that is, the unequal distribution of cultural capital between students. Those with more cultural capital in terms of economic, social, and political resources have the advantage of shaping the values, ways of thinking, and practices of the social world. They define and control the official histories that support their dominant practices that, in turn, are circulated and repeated with authority and are practiced and embodied in the social consciousness of all. Institutions such as government, education, and other bureaucracies are at the dominant group's disposal to "mold mental structures and [impose] common principles of vision and division" (Bourdieu, 1994, as cited in Webb, Schirato, & Danaher, 2002, p. 92). It is the culture of the dominant group that is embodied in education institutions.

This is not dissimilar to what happens in Australia (and indeed other parts of the world). In other words, by imposing meanings and ways of thinking and acting, schools "operate to perpetuate specific power relations as they unfold and are expressed in the dynamic of social evolution" (Grenfell, 2008, p. 159). In Australia, the "colonizer/settler-colonized" relationships are also reproduced over and over again through symbolism, metaphors and practices in society, behaviors of regard and disregard, word choices, and through the media and also within schools. By maintaining the status quo, the dominant group benefits from the profitability of capital accumulation and sustained positions of social privilege while subordinated groups endure continual symbolic violence and suffering. In questioning Indigenous people risk being perceived as aggressive, undeserving, and ungrateful.

The notion of *habitus* further explains the complicity. For Bourdieu, "habitus is a cultural agent before it is a social form of identity" (Webb et al., 2002, p. 117). Emerging from early socialization experiences and restructured through interactions with the social world, habitus "sets structural limits for action" while also "generating perceptions, aspirations and practices that are consistent with the conditions under which it was produced" (Swartz, 1997, p. 103). Thus, *habitus* is a product of early socialization experiences, particularly those that occur within a family, and continues to restructure itself by what an individual encounters in the outside world. As Mills (2008) states, it forms individuals' dispositions and "recurring patterns of social outlook—the beliefs, values, conduct, speech, dress and manners that are inculcated by everyday experiences within the family, the peer group and the school" (p. 100).

Dispositions that make up *habitus* reflect the social context in which they were acquired and, therefore, shape what the person perceives as reasonable or unreasonable, likely or unlikely, natural or unthinkable for them. Individuals become predisposed to adjust their aspirations and expectations accordingly. As Bourdieu explained, "agents shape their aspirations according to concrete indices of the accessible and the inaccessible, of what is and is not for us" (Swartz, 1997, p. 107). Consequently, individuals tend to naturally move toward those positions that best match their dispositions and, in turn, avoid those that conflict. In projecting the future that fits them and acting accordingly, individuals accept their social reality as the way things are. They "accept their fate and misrecognize the arbitrary for the essential" (Grenfell, 2008, p. 59).

Cultural differences, according to Deyhle and Swisher (1997), “intertwine with socio-structural factors to create an educational context that ensures failure for many American Indian students” (p. 163). The same could be said of Indigenous Australian students and possibly other Indigenous peoples, for example, Maori in New Zealand, Native Hawaiians, and First Nations people in Canada. The work undertaken by Bishop (2008) in New Zealand on structures within schools provides a strong evidence base. We know there are some Indigenous students who do succeed by choosing to alter their behavior while interacting with and within the education system and the rules that have been applied by the dominant culture. This does not mean they alter their behavior in the home environment. However, others may have difficulty with this or are unwilling to and may appear to “drift through schools” or to be “disengaged from schooling,” while others do not see the value in graduating and choose to drop out and others will draw the difference between being educated about culture, people, and the world and being schooled in a classroom. By making choices of this nature and by accepting the superiority of others in the social world as natural (Henderson, 2000; Memmi, 1967) or as the way things are, American Indians and Australian Indigenous people also participate in their own subjugation and the reproduction of the social stratifications due to the nature of contemporary society.

Another way of viewing this situation is to argue that Indigenous peoples are generally asked to fit within someone else’s framework of seeing the world, including the education system that sits within that world (Henderson, 2000). Indigenous people are asked to fit into a dominant viewpoint of education and the curriculum that is contained within that education (Henderson). In this way, the dominant views and understandings are given privilege, status, and prominence in Australian and American contemporary society and override all other views and systems. Indigenous people and others are then asked to fit in with or accept these views (Fredericks, 2009, 2011; Henderson, 2000). If they do not, they risk being “uneducated” and then risk a life of poverty and limited choices. In Australia, the USA, and other places in the world, Indigenous people know what it is like to exist within learning environments which were established by denying their existence. Indigenous experiences of this denial are often topics of papers and discussion at international Indigenous conferences along with strategies to combat the denial. Schools can be places where curriculum and structures seek to continue this denial and where they attempt to assimilate Indigenous peoples.

Toward a Lens of Social Justice

In 1993, the then Aboriginal and Torres Strait Islander Social Justice Commissioner Mick Dodson lamented the long history of social injustice for Indigenous Australians and the stark reality of what for many is a daily struggle.

> Social justice is what faces you in the morning. It is awakening in a house with adequate water supply, cooking facilities and sanitation. It is the ability to nourish your children and send them to school where their education not only equips them for employment but reinforces

> their knowledge and understanding of their cultural inheritance. It is the prospect of genuine employment and good health: a life of choices and opportunity, free from discrimination. (Dodson p. 1)

There are various definitions of social justice. John Rawls (1971) observed that a consideration of justice involved "the basic structure of society, or more exactly, the way in which the major social institutions distribute fundamental rights and duties and determine the division of advantages from social cooperation" (p. 7). Rawls observed that "men [sic] born into different positions have different expectations" and that "some institutions of society favor certain starting places over others" and that "These are especially deep inequalities" (p. 7).

But with Indigenous peoples of Australia and America, there is a past history that must be confronted as well. Rawls quotes Aristotle's notion of *justice* which involves refraining from *pleonexia*, meaning "from gaining some advantage for oneself by seizing what belongs to another, his property, his reward, his office, and the like, or by denying a person that which is due to him, the fulfillment of a promise, the repayment of a debt, the showing of proper respect, etc." (p. 10). Clearly Indigenous peoples are deeply disadvantaged in ways the majoritarian poor are not. The exploration of this dilemma is one of the major concerns of this chapter.

The Role of Decolonization in Social Justice

In formulating a present and future classroom or education system, which does not reinstate the injustices and inequities of the past, certain steps are required. Sherwood (2009) says that "To take these steps requires a balance of histories, informing our current political and social context, critical reflexive practice and open communication" (p. 24) with Indigenous people. The work of Sherwood and her colleagues (Sherwood, Keach, Keenan, & Kelly, 2011) along with Battiste (1995), Rigney (1997, 2001), Smith (1999), and others assists us all in the process of learning and developing a deeper understanding of the relations between Indigenous and non-Indigenous peoples within education contexts, knowledge, and power gained through colonization. Lowman (2007) explains that the idea and process of decolonization and self-decolonization are essential for achieving peaceful and equitable relationships between settler and Indigenous peoples.

The coauthors assert that decolonization processes are ways that we can come to know ourselves and each other more. We need to know and understand how we all contribute to ongoing oppression, systemic marginalization, and institutional privilege of some over others in ways which continue to subjugate Indigenous peoples and maintain the dominating groups control through positions of power as in scripts of the past. Decolonization is not just a process for non-Indigenous peoples; both Indigenous and non-Indigenous people have been colonized through the global colonial project (Battiste, 1995; Henderson, 2000; Smith, 1999). The writings of authors from New Zealand, Canada, Africa, Central and South America, Australia and elsewhere, some of whom have already been cited provide evidence that colonization is an issue for many Indigenous people. We assert at this point that in the context of our work, it is the responsibility of non-Indigenous Americans and Australians to investigate their own subjectivities and their own societal, political, and cultural positioning in order to fully engage with Indigenous people (MacIntosh, 1998; Nicoll, 2004a, 2004b). It is about non-Indigenous people taking up the responsibility for themselves in this regard.

Moreton-Robinson (2004, 2005, 2007) contends that it is white hegemony which impacts their positioning of Indigenous peoples and this issue needs to be explored and challenged. Non-Indigenous people need to ask if they are ready for it even when they desire for this to happen. We acknowledge it can be confronting. Similarly, it is the responsibility of Indigenous people in America and Australia to do their work by examining how they are a product of the colonial project (Rigney, 1999; Sherwood, 2009; Sherwood et al., 2011; Smith, 1999). Failure to do so will maintain the countervailing voices of power and privilege between Indigenous and non-Indigenous peoples.

This brings to question the effectiveness of education reforms in making significant changes in the outcomes students experience in schools. Like many other federal education reforms preceding it, the reality is that the implementation of the American *No Child Left Behind Act of 2001* (NCLB) has not advanced educational progress for the nation's Native Americans. With this, it is safe to conclude that the entire system of changes, interventions, and other reforms schools employed in the past decades have not been effective in improving the educational outcomes for Native youth (Maynor, 2011). European American "thought, knowledge and power structures dominate present-day society" (Brayboy, 2005, p. 430).

From the perspective of Native Americans, education reforms have not worked because the dominant ideals continue to marginalize or exclude their rich cultural heritage and presence. This is additionally the case for many Indigenous Australians. So far we have described how the legacy of colonization and oppression shaped and continues to influence policy and practice which impact the life chances of Indigenous students in Australia and America. In the final part of this chapter, we consider some of the ways that educational leaders in schools might take up the challenge of working for justice and equity.

Educational Leadership for Social Justice

The field of educational leadership for social justice is concerned with exploring solutions to issues of inequality in schools (Dantley & Tillman, 2006). A variety of frameworks and theories has been put forward by scholars as they have endeavored to understand how theories of social justice can be used to better inform the practice of educational leadership. We would argue that leadership not only needs to question existing practices and policies in the school that perpetuate disadvantage but should call "into question the larger societal assumptions and practices which relegate schools to the role of reproducing them inside" (English, 2006, p. 9). This type of leadership calls for leaders who not only are culturally aware but have a deep respect and understanding of what Bourdieu (1984) has called “cultural capital” and the privileged forms it takes in the public educational systems of both nations.

We also put forward that in the case of social justice and Indigenous peoples, educational leadership must also address some fundamental issues in regard to the impacts of colonization and formulate a present and a future that does not reinstate the past. In the section that follows, we advance some ideas that may help to contribute to the debate about how educational leadership can be transformed to focus on issues of social justice. The achievement of American Indian students has not been substantially improved in that students are engaged in a perpetual cycle of low achievement, as evidenced by findings in this study. As noted, past and current education reforms have not changed the pattern of low achievement for Native students because deeply ingrained ideals and inequalities continue to define educational policies. As a result, American Indian students are considered less likely to be successful when compared to their white peers, and that expectation, too often, is the reality.

The analyses of American Indian patterns of proficiency conducted in this study provided evidence of this. Many of the current education reform models promote provisions outlining equal access and support to ensure minority and disadvantaged students succeed educationally. Standards and improved test performance have increasingly become integral parts of these reform movements. Yet, both standards and tests represent the social and cultural knowledge and language for the dominant class and, therefore, work against most minority populations. Well-meaning intentions and reforms have continued to fail because Euro-American ideals persist, while American Indian worldviews are disregarded. Instead of embracing differences and validating the academic and cultural needs of American Indian students, reforms such as the current NCLB Act and others have caused states to submit to new standards that do not acknowledge what is most crucial for Native students to succeed.

Bourdieu’s mission was to explain the social, political, and cultural practices that surrounded him in a manner that would help others restore the meaning of their actions (Swartz, 1997). Here lies the first implication for school leaders, policy makers, and educators at every level. Schools need leaders who possess the fortitude to radically rock the boat, embrace differences, and challenge the status quo that is currently perpetuated in schools. However, before doing so, an individual must first tackle their personal internalized dispositions.

Consistent with Bourdieu’s argument, through habitus, individuals have unconsciously been led to value the dominant culture to the rich culture and heritage of others who have been marginalized in the process. Senge (2006), in *The Fifth Discipline*, discusses *mental models* as “deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action” (p. 9). Fredericks (2010b) demonstrates how signs, symbols, representations, and images within an array of settings are not neutral or innocent and how they produce and reproduce power and social practices and structures and the interrelationships between Indigenous and non-Indigenous peoples. Devaluing stereotypes and remnants of colonial education along with misinformed histories about Indigenous people can be found everywhere including schools in both America and Australia, no doubt in other countries too, for example, Mexico, Canada, and further afield. This is how schools can be sites of "social struggle and contested realms of identity" (Foucault in Gordon, 1980, p. 149) even while proclaiming that they have a "good understanding of cultures" and are "inclusive."

A common perception in North Carolina's public schools is that American Indians are a part of history that no longer exists. Therefore, a radical disruption is necessary and must first begin with reflection on oneself, one's personal assumptions, and actions. Lomawaima (1999) supports this position in the context of the broader education community in stating,

> As long as stereotypical ideas are accepted as natural facts, they will never be scrutinized, analyzed or revised. They will become dominating influences in the training of young minds, Native and non-native alike. Native and non-native educators have an opportunity and responsibility to scrutinize, analyze and revise the natural truths and pedagogical theory and practice they implement every day. (p. 21)

School leaders working in Native communities and schools serving American Indian students and Indigenous Australian students must also realize relationships reflecting a genuine, mutual understanding and respect for one another are critical to improving Indigenous education. The key to the success of Indigenous students is the establishment of meaningful relationships, not only within the school between teachers and administrators, but also with community and tribal leaders. Tribal communities value their relationships with schools, and they want active engagement. In interviews the State Advisory Council on Indian Education (2009) conducted, a Cherokee Native commented:

> We don't only want a place at the table. We'd like to have a voice as how things should go for us and not have things administered on us. We need to be involved and part of the decisions and in shaping what we know works for us. (p. 20)

Through meaningful relationships, intercultural understanding and a climate for collaborative learning and leadership are created. White, Ober, Frawley, and Bat (2009) argued for what some Indigenous people in Australia's Northern Territory label *both ways* education. Instead of just being one way (called *kartiya*, i.e., a European way of schooling), they argue for a kartiya and *ngumpit* (Aboriginal) way together. "This concept of two-way schooling, which involved reciprocity and obligation, involve[s] curriculum, knowledge, policies and power" (Whiteet al., p. 91).

School leaders working in Native communities and schools serving Indigenous students must also understand the profound effect historical attempts to eliminate Indigenous cultures and languages have on Native communities. As a Cherokee Native (cited in State Advisory Council on Indian Education Report, 2009) articulated, "For our Indian people, education is needed for success but also to reestablish the importance of our identity and our own culture" (p. 21). This is the crux of the power struggle. As Brayboy and Castagno (2009) asserted in their research:

> No evidence is found in Indian Country that parents and communities do not want their children to be able to read and write and do mathematics and science—these communities are keenly aware of this need and are engaged in this process but they insist that children's learning to "do" school and should not be an assimilative process; rather it should happen by engaging culture. (p. 31)

American Indian parents and communities support an educational approach that values both Native and Western knowledge because both are necessary to benefit Native communities. It is important for school leaders to provide leadership to ensure connection to the Indigenous culture, traditional values, knowledge, and resources of the state's American Indian community so they are perceived of value in the same way that those of the dominant culture are of value. Moreover, leaders should show how devaluing and disregarding creates situations which disadvantage and marginalize other people in society.

Given the increasingly culturally, linguistically, and racially diverse society in which we live, there is an urgent need for school leaders to be culturally aware and to have a practice-based understanding of race, gender, class, and other types of difference and how this difference impacts upon learning for students. As Coulby (2006) states, it has never been more urgent for educators to "recognize, tolerate and, at best, understand cultures other than that of the state into which people are born" (p. 246).

Lopez, Gonzalez, and Fierro (2006) argue that culturally aware school leaders are those who "cross borders" and "embrace hybridity." Although they are referring to educational leaders who work in districts along the US–Mexican border, their work has relevance to this chapter. According to the authors, leaders who cross borders (i.e., different worlds, different territories, different cultures) "reside in two worlds at once" (p. 65). It could be said that non-Indigenous educational leaders who work in locations where there are Indigenous students or students of different race, religion, culture, or other types of difference are involved in crossing borders. Similarly, Indigenous leaders who work within existing western bureaucratic structures are "walking between two worlds" (Fitzgerald in Kamara, 2007, p. 12).

The implication raised by Lopez et al. is that effective educational leaders who find themselves in these contexts employ a "hybrid leadership style" (p. 65) that allows them opportunities to inhabit a variety of positional spaces. Here, borders are not seen as barriers but sites of opportunity and possibility. Working across borders requires leaders to work navigate a politically complex environment and "work confidently and with influence in two worlds" (Cranney & Edwards, 1998, in White, Ober, Frawley, & Bat, 2009, p. 88). As Lopez et al. (2006) explain, working across borders requires leaders to "have a keen awareness of school-community relations, group dynamics, intercultural tolerance, politics and power, team building, and community engagement and how to effectively bridge these 'Borders'" (p. 66).

The results from a 4-year research project that explored Indigenous leadership in remote settings in Australia have highlighted the need for leaders to engage in an "intercultural space" (D'Arbon, Fasoli, Frawley, & Ober, 2009, p. 3) so that they can best support Indigenous students to achieve in the mainstream education system without compromising their cultural identity. Yet, D'Arbon et al. indicate that working across two spaces can be challenging for both Indigenous and non-Indigenous leaders due to language and cultural differences. In referring to the unique challenges faced by Indigenous female principals working in remote schools within the Northern Territory (Australia), Kamara (2007) states:

> while they [Indigenous female principals] are advocates for Indigenous children, parents and the entire community with a strong voice on Aboriginal issues, they also represent the central system as ambassadors for promoting western bureaucratic structures that are process driven and are in many ways the antithesis of Indigenous worldviews. (p. 17)

Similarly, non-Indigenous leaders who find themselves in Indigenous communities face significant tensions in their daily work as they seek to achieve common understandings and work in genuine partnerships with parents and members of their local community (Jorgensen & Niesche, 2011). D'Arbon et al. (2009) maintain that when working in two worlds, what becomes important is a strong "intercultural identity" (p. 40) which acknowledges and values knowledge, language, and differences from both Indigenous and Western perspectives. Moreover, ongoing learning that calls for an "even understanding" among leaders and their communities is vital for a balanced approach to leadership (D'Arbon et al.).

A number of lessons can be distilled from the research of Lopez et al. (2006) and D'Arbon et al. (2009), and these are as follows:

- Leaders need to understand, respect, and work across both worlds.
- Leaders need to challenge assumptions and expectations of themselves and others.
- Leaders need to learn about the community, develop authentic dialogue, and be responsive to their community's needs.
- Leaders need to be advocates for the students and the community (D'Arbon et al., 2009; Lopez et al., 2006, p. 78).

Another important issue is the role Indigenous leaders themselves can play in inspiring and supporting the education success of Indigenous students. There are many examples of outstanding Indigenous leaders within schools, universities, and communities in Australia, the USA, and other geographic localities who are doing this. It is not surprising, then, that Indigenous teachers and leaders have been identified as a central approach designed to support educational achievement for Indigenous students. Their contribution to schools cannot be underestimated as they send a vital message to students that it is possible to succeed without compromising one's cultural identity. Thus, the recruitment and retention of Indigenous educators is a key issue for education systems (Australian Human Rights Commission [AHRC], 2009).

However, it is a concern in Australia and the USA that there is an underrepresentation of Indigenous leaders and teachers working in schools. For example, only 1 % of teaching staff in all government schools in Australia are Indigenous people (AHRC, 2009). In Australia and the USA, Indigenous people are generally positioned as being in "high need" and "lacking" and as such the point that Indigenous people value add when they are undertaking their roles as teachers and leaders is largely missed. That is, not only is the education system getting someone who has been highly trained and educated as a teacher or an educational leader but also someone who is Indigenous and who may also have (depending on their background) another set of highly developed skills, experience, and knowledge to draw upon. The value-adding benefits that Indigenous people can offer within an educational system are often not recognized or realized because non-Indigenous people and the broader system get caught up (sometimes unwittingly) in the stereotypical "needing" and "lacking" attributes vested to Indigenous people rather than seeing "they can do this, and this and that." When Indigenous people are regarded for all that they bring to a school or education environment, the relationship changes between Indigenous and non-Indigenous people: They all become colleagues, peers, and supervisors working together for change in education within that school or education environment.

Conclusion

The nexus of the quest for social justice for Indigenous peoples in both Australia and America is the recognition of what Taiaiake Alfred (2009), from Kahnawake in the Mohawk nation, has called "a certain way of thinking with an imperialist's mind" (p. 102). This mindset "marks a person as guilty [in] taking part in territorial dispossession, the political denial of Onkwehonwe (original people) existences, racialized violence and coercion, cultural disruption, and economic exploitation" (p. 103).

Alfred (2009) disputes the labeling of "Aboriginal" to the Onkwehonwe peoples. He indicates that this identity is "a legal and social construction of the state, and it is disciplined by racialized violence and economic oppression to serve an agenda of silent surrender" (p. 23). Alfred issues a challenge to all Onkwehonwe people when he observes that:

> change cannot be made from within the colonial structure. Institutions and ideas that are the creation of the colonial relationship are not capable of ensuring our survival; this has been amply proven as well by the absolute failure of institutional and legalist strategies to protect our lands and our rights, as well as in their failure to motivate younger generations of Onkwehonwe to action. (p. 24)

What Alfred (2009) advocates is a profound shift in mental positioning within those who work in government and education. This means stepping out of the colonial mindset and seeing differently. Alfred believes that *justice* is important, but that it is not the end of the struggle. The reason is that "However noble and necessary justice is to our struggles, its gaze will always be backward. By itself, the concept of justice is not capable of encompassing the broader transformations needed to ensure coexistence" (p. 27). Alfred cites the old maxim, "No justice, no peace" where "we must move from injustice, through struggle, to a mutual respect founded on the achievement of justice and then onwards towards peace" (p. 27).

Max Dulumunmun Harrison, a Yuin man of Australia, makes a similar point when he wrote that "There can be no reconciliation between Indigenous and non-Indigenous people of this land because there has never been a partnership in the first place to reconcile about" (cited in McConchie, 2003, p. 1). Dulumunmun goes on to capture the spirit of true respect which would be the nexus of a social transformation founded on social justice:

> The only way I can see the non-Indigenous person making amends is by walking the land with Aboriginal people and understanding their spirituality to the land; understanding why a tree is important, why a tree is sacred; understanding why the rivers and the waters become sacred; understanding why the wind is sacred; understanding all the animals that they share this planet with (cited in McConchie, 2003, p. 3).

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Chapter 40
Corrupting Children: The Regulation of Children's Gender Presentations and Identities and Implications for Educators and School Administrators

Gerald Walton

In September 2011, the *National Post*, one of Canada's national newspapers, ran a full-page advertisement for a right-wing Christian fundamentalist organization presumptuously called the *Institute for Canadian Values*. Their ad was a response against lesbian, gay, bisexual, and transgender (LGBT) lobby groups and activists who seek to infuse school curriculum and policy with representations of LGBT issues, histories, and people in society. Specifically, the ad asked that children not be made to feel "confused" about their gender identities as boys or girls and attributed such confusion to "exposure" to discussions in school about LGBT issues. The ad also claimed that such discussions "corrupt" children. In response to widespread outrage about the advertisement, the *National Post* printed an apology a few days later, claiming that the advertisement was not vetted in accordance to their policy on advertising. Discussing the debate about such curriculum was appropriate in a democratic society, the editors of the *National Post* claimed, but labelling it as "corruption" of youth crossed the line.

In this chapter, I argue that transphobic and homophobic attitudes and practices, themselves, rather than discussions about LGBT issues and people in school curriculum, "corrupt" children. By "transphobic" and "homophobic", I am referring to social systems across cultures that privilege certain gender and sexuality identities and expressions (those that accord with social norms and expectations) and stigmatize other identities and expressions (those that do not accord with social norms and expectations). Such regulation enacted through official state and school policy and social attitudes and beliefs are guided by and perpetuate a system of ideology about gender that boys and men should look and act in certain ways that are associated in the culture with masculinity, and girls and women should look and act in certain

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ways that are associated with femininity. Gender itself, then, is a system of regulation that operates in societies and schools. It forms the basis of stigmatization and marginalization of gender atypical children and youth while also regulating masculinity and femininity of all children.

In short, gender ideology shapes the human world and provides gender typical people with measures of unearned social privilege and gender atypical people with measures of undeserved social oppression. This is the starting point from which the rest of this chapter will unfold. Following Davison and Frank (2006) who sought to "demystify what we have come to believe are the 'truths' of gender" (p. 162), the purposes of this chapter will also be to:

- Illuminate the ways in which gender as a social practice shapes, influences, and regulates identities, practices, relationships, and social politics
- Describe how gender is entangled with sexual identity (or what I would prefer to call sexuality identity)
- Indicate how gender has been and continues to be a site of contestation, resistance, and refusal among those who are disaffected by, as Connell (2009) puts it, "regimes of gender" (p. 72)
- Discuss how regulation of gender plays out in schools
- Propose how teachers and administrators can foster social justice by considering conceptions of gender anew and how educational policy can play a role in supporting them

What Is Gender?

Cross-culturally and historically, gender is a powerful social force. It shapes everyone's lives in deep and complex ways, sometimes in the explicit foreground, other times in the background, but at all times in operation. Despite its ubiquity, gender as a concept defies precise definition. It is, as Glover and Kaplan (2000) put it, a "busy term" (p. ix). A universal definition of gender does not exist and it is an arguable point whether or not one could or should exist. As Rudacille (2005) found when she asked scholars and activists gender and sexuality to articulate the meaning of gender, she heard widely diverse ideas about the concept. Simply put, she learned that gender and how it manifests in people's lives and societies are not simple matters. Gender is highly complex, manifests in widely different ways depending on cultural context, and defies convenient conceptualizations. However, it can be said that it provides people with a key aspect of their personal and group identities by which they engage in their social world. Gender is thus a social accomplishment, not as uniform, stable, or fixed, but in perpetuity through processes of normalization, indoctrination, and regulation, as well as resistance and refusal.

Complex and convoluted, the ways that gender plays out can foster social injustice in fairly predictable and patterned ways. Gender is not simply about two discrete categories of "boys" and "girls" – and the adult equivalents of "men" and "women" – and their supposed differences. It is about learning and relearning the codes, norms, and expectations of gender throughout a lifespan, in accordance with cultural, ethnic, and historically specific contexts and how such codes are reinforced and regulated.

Even the idea that gender is socially constructed remains a matter of debate (Bradley, 2007; Rudacille, 2005). Further, that which constitutes "normal" and "natural" in terms of gender varies significantly by historical, cultural, political, and interpersonal contexts. In general, however, what we can learn from gender outsiders – the atypical – regardless of the context, is how gender is socially constructed and regulated rather than essentially "normal" and "natural". By "socially constructed and regulated", I do not mean that categories are rigid and static (Davison & Frank, 2006) or that people are hapless and powerless victims of social norms. According to McGuffey and Rich (2011), it is not simply the case that girls and boys, women and men enact "handed-down scripts" (p. 166) by which to perform gender. Gender roles of masculinity and femininity are "not simply imposed on us", claims Bradley, but "something which we are constantly engaged in creating and recreating" (p. 21).

Fair enough. Yet, regardless of our cultural or ethnic context, we are not free to create gender anyway we like, completely free of the potential for negative consequence (Connell, 2009). Acknowledging the complexity of the tension between structural imposition and individual and group agency, it remains the case that gender as a practice constitutes a form of social regulation (Haskell & Burtch, 2010; Pascoe, 2007), as evidenced by gender outsiders who reveal how these gendered attributes and expectations are, themselves, socially constructed through the daily *practices* of gender. Bornstein (1994, 2006), a gender theorist and activist, refers to such gender outsiders as "gender outlaws" meaning that there are indeed rules of gender presentation (clothing, physical and vocal mannerisms, interests, occupations, and so on) that adversely affect those who are not gender normative. Similarly, Wilchins (2002) describes gender as a series of meanings and symbols "and the rules, privileges, and punishments pertaining to their use – for power and sexuality: masculinity and femininity, strength and vulnerability, action and passivity, dominance and weakness" (p. 25). She also explains that to be "gendered" means investing something as masculine or feminine, such as "ships, clothing, sexual positions, pens, bowls, hand positions, head tilts, vocal inflections, body hair, and … sports" (p. 25). For instance, meat is routinely gendered as essential food for boys and men (see, for instance, the September 2009 cover of *Men's Health* which announces "the best guys foods in America", all of which are meat based), whereas salad and yogurt are typically feminized in advertising media (see, for instance, any typical salad dressing or yogurt television commercial).

A key idea here is gender is not limited to a state of being or an identity; it is also a "practice". As Butler (1990) famously points out, norms become norms only through repeated practices that collectively and over time create social convention, foster continual scrutiny, and, when warranted, incite correction. Gender "performativity" is that which has become normative and thus not readily noticed by the "performers". As she puts it, "Gender is the repeated stylization of the body, a set of repeated acts within a highly regulatory frame that congeal over time to produce the appearance of substance, of a natural sort of being" (p. 33). Such repetition belies common sense notions of gender being an unproblematic social enactment of sex that males are therefore boys or men and that females are therefore girls and women (Devor, 1989). Norms, then, are practices that are always in process and, as such, are continually subject to change.

Identifying what gender is *not* may be a useful step towards understanding what gender is. Simply put and contrary to common understanding, gender is not sex. "Gender" and "sex" are often used synonymously and assumed to be inextricably linked. "Sex" is a biological category determined at birth through observation of genitalia. In the first few seconds of life, people are categorized as either "male" or "female" and attributed corresponding genders of "boy" and "girl", notwithstanding intersex people for whom such dualistic categorization is problematic. Many people mistakenly conflate gender with sex (male and female) and rarely acknowledge those who are not distinctly male or female, such as intersex people (Callahan, 2009). Physical diversion from the two-sex model is typically a source of social and cultural shame, as depicted in the 2007 Argentinian film *XXY*.

The biological is routinely conflated with the social. The point to be made clear, here, is that gender is read on the body without the "reader" knowing about physical attributes such as genitalia size and shape and chromosomal formulation. In other words, most of us presume a particular gender of people around us based on surface cues that are visible, such as clothing, hairstyle, and vocal tone. When we see someone who does not fit into our socially constructed and affirmed ideas about how gender is supposed to *look*, we are often confused and intrigued. Some are fearful and angered. Gender, then, provides a framework by which "normal" and "natural" are perceived and (mis)taken as givens. As a direct result, gender insiders and outsiders are constructed in accordance with those who fall within the scope of "normal" and "natural" and those who do not. It is the former group, whom I will refer to as gender typical, who acquire social capital and privilege on the basis of being gender normative. Being gender normative in accordance with one's sex as male or female regardless of sexuality is increasingly becoming known as *cisgender* (Yost & Gilmore, 2011). The latter group, on the other hand, whom I refer to as gender atypical, are routinely dismissed as inferior, stigmatized through fear, and targeted with violence of exclusion if not verbal and physical assault. Admittedly, it is not the case that humans can be so easily dichotomized between insiders and outsiders; many of us are simultaneously insiders and outsiders in different ways and at different times. Further, such dichotomization may be typical of Western ways of thinking (Bockting, 1997; Brumbach, & Jarvenpa, 2002; Derrida, 1976; Nanda, 1999). True enough. However, referring to a dichotomy provides a convenient heuristic from which we can later consider complexities, contradictions, and nuances.

In Western practice especially, gender is a social system that organizes people into one of two categories or what gender theorists such as Garfinkel (1967) and Devor (1989, 1997) call the two-gender model. The model describes how, hegemonically, there are two and only two genders, everyone must fit into one or the other but not both and not neither, and gender is immutable for life. For many people, the assignment of their gender identity and role based on genitalia is unproblematic. Being cisgender, they may feel comfortable with the sex they are assigned at birth and the gender that corresponds. However, some people do not feel comfortable with their expected gender role based on their assigned sex. For example, someone may be born with female genitalia and thus socialized as a girl and expected to present themselves to others as feminine as visual cues of being a "girl", but this socialization might feel false to the person and she may not feel comfortable being referred to as a girl. In other words, although people see her as a girl, *he* may not see *himself* that way. One of the problematic aspects of gender is that, in Western society, language itself limits the options and makes it nearly impossible to escape being pressed into these rigid gender binaries. In other contexts such as South Africa (Currier, 2011; Epprecht, 2004) and Namibia (Hoad, 2007), gender outsiders may be considered cultural and racial traitors.

Thus, many people do not fit into the two-gender, two-sex model, either because they identify as the "opposite" gender regardless of their sex or because neither gender identity feels inclusive enough. Most are born either male or female and expected to be socially recognizable as boys or girls and later as men or women. To be socially recognized, one has to learn what these gender categories mean or, more accurately, one has to learn how to think, behave, and sound like one gender or the other so that others can "read" one's gender. In other words, one identifies as one gender or the other and learns the norms of conduct and character associated with gender category that corresponds to the sex category. Thus, gendering and being gendered is a process of learning in association with sex (Shaw, 2005; Wilchins, 2002, 2004).

According to Bradley (2007), gendering operates at a micro level (through patterns of individual behaviour and social interactions), a meso level (through norms that are regulated institutionally and socially) and a macro level (e.g. through society in the form of gendered divisions of labour). She describes gender as a "social dynamic" (p. 181) that operates at these three levels simultaneously. Similarly, Connell (2009) claims that gender is a "dynamic system" (p. 89), involving instability, contradiction, and crisis. Despite the evolutionary characteristic of gender as a practice, gender remains a key ideological mechanism for social injustice because, as norms shift and evolve, so do conceptions of what constitutes normalcy, resulting in the privilege of some through no effort of their own and the oppression of others through no fault of their own.

Gender and Sexual Orientation

Sexual orientation is connected to, but not synonymous with, gender because heterosexuality is the presumed and prescribed sexuality that are expected of all boys and men, and girls and women (Rich, 1980), and those who present their gender normatively are widely presumed to be heterosexual in practice and identity. The so-called gaydar is a popular and unscientific concept whereby people somehow sense other people’s homosexual orientation. Gaydar typically registers for the observer not from actual sexuality, of course, but from gender cues that are non-normative.

I make a key distinction between sexual orientation and sexual orientation identity. Sexual orientation describes the attractions, desires, fantasies, and behaviours that constitute sexuality, meaning what people actually do (or want to do) sexually. Sexual orientation identities, on the other hand, are self-identities that may or may not reflect actual sexuality. Many people who identify as “straight”, for example, have had (and may continue to have) homosexual sex, despite being publicly known to be in heterosexual relationships. Gendered sexuality (Devor, 1994) describes how masculine men are usually assumed to be heterosexual, while feminine men are usually assumed to be gay. Similarly, masculine women are widely assumed to be lesbian, while feminine women are usually assumed to be heterosexual.

However, such attributions are often incorrect. Attributed identities and self-identities are often not aligned with actual behaviour. Like gender attribution, sexual orientation is also attributed to individuals but not because others have witnessed actual sexual activity but rather because of the investment we collectively have made ascribing gender to mannerisms, clothing, and ways of moving and talking. As Namaste (2006) correctly points out, sexuality and gender get confused in Western societies. Among children, for instance, she notes how some boys and girls will call a masculine girl “dyke” regardless of whether or not she is a lesbian, and feminine boys will get called “queer” regardless of whether or not they are gay. Such boys and girls do not fulfil the norms of their assigned gender role, namely, masculinity for boys and femininity for girls. Namaste points out that “[W]omen, (especially those who are perceived to be lesbians or ‘masculine’) are most at risk in everyday locations that assume the ‘naturalness’ of heterosexuality” (p. 589). Thus, she argues that, “the demarcation of public space is intimately related to the articulation of culturally sanctioned gender identities” (p. 590) and offers the term “genderbashing” (p. 591) to describe what actually happens during the so-called gaybashings that target gender transgressors who are thought to be gay or lesbian (and sometimes are) rather than actual gay men and lesbians. The crucial point here is that it is usually non-normative gender cues that raise the attention of gaybashers rather than actual sexuality or sexuality identities.

Schools as Sites of Gendered Regulation and Resistance

Around the world, one of the key sites where gender is normalized, practiced, and regulated is schools (Haskell & Burtch, 2010; Meyer, 2009, 2011). Students are not just individuals who attend school; they come into schools as gendered human beings in progress. By that time, children have had 4 or 5 years of learning the practices of gender; being gendered is another way of saying that gender is a social process rather than a product. Prior to stepping into a classroom for the first time, children have been learning the practices of gender since the day they were born. As described by Chanter (2006),

> As soon as we are born (perhaps even before) we are color coded as boy or girl, and systematically trained according to our genders. Our rooms are painted sky blue and decorated with mobiles of toy planes, or rose pink and decorated with flowers. We are either given Barbie dolls to play with and dressed in frilly clothes, or footballs to kick around and pants to wear. (p. 3)

Children later come into schools to learn the formal curriculum and also more informal lessons about gender, especially from peers in the form of what Kessler and McKenna (1978) refer to as the "gender attribution process" which they define as "the process through which we all assign a gender to every person with whom we interact, based on rules and assumptions that are usually unacknowledged or unperceived" (2006, p. 165).

Some students will excel in these informal lessons on gender (which is to say they will learn to present themselves in gender normative ways in accordance with cultural expectations); others will not. Either way, the lessons pertain to all students. What I am indicating here is how school culture mirrors norms, attitudes, and prejudices of the societal context and informally teaches all students about the rules of gender. Such rules are not necessarily written down in school manuals or posted on bulletin boards or school websites. They are, however, made highly evident through the reactions of others when students break them or otherwise contravene them.

Like light against dark, normalcy is most evident in the glaring contrast against non-normalcy. Socially, gender variant boys and girls straddle an uneasy line between boy (and the requisite interests and characteristics usually considered to be masculine) and girl (and those considered to be feminine). The term "sissy" is widely used as a pejorative label against boys as a way of enacting fear through bullying as well as asserting normalcy of non-sissies. According to Letts (2005), sissies are "[s]ituated at the intersection of misogyny (hatred of women) and homophobia (irrational fear of homosexuality)" (p. 796). Sissies are perceived as threatening to other boys that somehow they will infect them with (what are perceived as) their feminine afflictions. To maintain masculinity of other boys, sissies must be rejected or expunged through bullying, ostracization, and violence. In Martino and Frank's (2006) view, regulating masculinity as a gender performance is an indication of a "'moral panic' and concern about failing masculinities at school" (p. 29).

In 2008, such panic took a deadly turn when 15-year-old Lawrence King was shot to death in Oxnard, California, by a male peer because Lawrence liked feminine jewellery, clothing, and make-up. The King murder, though extreme, is a tragic indicator that sissies are thus not included in boy cultures but are rejected from them and can, at any moment, become victims of physical violence and even homicide. Rejection and violence not only expunges sissies from the ranks of normative boys but also signifies to all other boys what could happen to them if they do not live up to the social expectations of what it means to act like a boy. The paradox here is that non-normative boys serve an important function for other boys; by comparison, the latter need the former to measure their masculinity. In short, violence towards sissies maintains gender boundaries and highlights how normalcy is constructed and regulated.

Boys who are labelled as sissies are usually instilled with shame. By comparison, tomboys, who are girls whose gender presentation and interests are associated with masculinity, are generally seen as socially acceptable but only until puberty (Bradley, 2007). After that, most tomboys are expected to act and look like gender normative girls. For most parents, gender non-conforming behaviour and interests of their children raise the fear that they will grow up to be gay or lesbian. Even among gay men, sissies – also known as queens, nellies, nancy-boys, and femmes – generally rank low on the gender hierarchy of men (Bergling, 2001; Martino, 2006). As is the case for other "gender deviants", such as cross dressers, tomboys, and intersex people, sissies are usually treated as abnormal (Wilchins, 2004). Medically, gender non-normative people are sometimes diagnosed with gender identity disorder (GID), which is a diagnostic category of the *Diagnostic and Statistical Manual of Mental Disorders* (DSM) of the American Psychological Association. The current version of the DSM includes GID but the term "gender dysphoria" has already become a term of preference to describe people who experience a high and consistent degree of anxiety and unhappiness about their gender identity in relation to their sex.

For instance, according to the website www.athealth.com (2000), boys diagnosed with gender dysphoria

> … tend to prefer to dress in girls' clothes. They often avoid competitive sports and have little interest in rough and tumble games. They frequently prefer to play games with girls, and they enjoy girls as playmates. They usually enjoy acting as a female figure, such as a mother or a princess, in the games they play.

"Treatment" for gender dysphoria ranges from psychotherapy to enhance self-esteem to behavioural modification that rewards gender typical behaviour and punishes gender atypical behaviour. Websites such as www.healthatoz.com (2006) proclaim that, "the cause of [gender dysphoria] is not known", while www.athealth.com warns that, "if the disorder *persists* into adolescence, it tends to be chronic in nature. There may, however, be periods of remission" (italics added). In his 1984 book based on longitudinal research, Green describes sissies as boys whose gender atypical characteristics represent a "syndrome", meaning a symptomology that is presumed to be indicative of emotional or mental disease or problematic condition in need of therapy.

Contrary to psychiatric diagnoses that represent individuals as having personal problems with their gender identities, the problem of sissies and tomboys is not themselves but rather the presumption held by most people, including some paediatricians and psychiatrists, that sissies and tomboys require treatment and, thus, are viewed as "damaged goods". Such conceptualizations mirror usual attitudes and presumptions evident in wider society. For instance, being a sissy is equated with being weak, which is anathema to normalized ideas about masculinity, boyhood, and manhood (Martino & Frank, 2006). Being a masculine girl raises fears that she is or will be a mannish lesbian. For gender typical individuals, that is, for cisgender individuals whose gender presentations and identities match the social conventions of their sex as male or female, gender conformity is strongly rewarded through inclusion among peers, parental support of boys being tough and aggressive and girls being feminine and nice, and media that replicate and validate such conformity. It is not that all parents encourage and sometimes enforce toughness in boys and niceness in girls, but many do. Such rewards act as an investment against children and youth becoming gender outsiders, including being gay or lesbian.

Despite strong social sanction for gender non-conformity, being a sissy or tomboy does not have to be viewed as a condition that "persists". Rather than stigmatizing feminine boys and men and masculine girls and women, a more supportive view is to consider that the dominant model of gender, limited to only two types and signifying dominant practices in society, does not account for a wide variety of gender expressions and identifications that have existed throughout human history (Connell, 1993, 1995; Devor, 1989; Lacqueur, 1990) and that exist cross-culturally today (Haywood & Mac an Ghaill, 2003; Letts, 2005). Devor (2007) describes the gender duality as "simplistic notions of gender, sex, and sexuality which dominate the thinking in society at large". Conversely, it is widely assumed, even among medical practitioners, that gender is a simple matter: either one is a boy (who should present himself as masculine) or one is a girl (who should present herself as feminine). Such notions do not allow room to consider that gender represents a myriad of expressions and identities. Referring to the constellation of genders, sexes, and sexualities, Devor (1997) aptly puts it this way: "it is time that we learn to count higher than two, that we learn to multiply and divide, and that we endeavour to expand our options exponentially" (p. 609).

Rather than being determined by biology, gender is a social practice that organizes society in particular, rigid ways (Connell, 1993). Pretending to be informed by "objective" science, the Diagnostic and Statistical Manual of Mental Disorders (DSM) does not account for the possibility that gender is a dualistic *social* system, imposed upon almost everyone and maintained through dominant social practices that are replicated and repeated daily. Societies vary in the ways that gender norms, expectations, and divisions between girls and boys are constructed and regulated (Sandfort, Melendez, & Dias, 2007). Generally, however, and in Western societies at least, such social conditioning to the expectations of gender begins at birth. Boys receive blue blankets, and girls receive pink ones. A pink blanket being given to a boy would be treated as a mistake, as misguided, perhaps even as abuse. A blue blanket given to a girl would likely be considered similarly, but perhaps not quite as urgently.

The fact that some boys and girls are stigmatized for being sissies and tomboys (especially after puberty) indicates that children are taught to "perform" (Butler, 1990) gender in particular, socially acceptable ways and shamed when such performances do not conform to social expectations. To characterize gender as a "performance" suggests that "doing" gender is intentional and chosen. On the contrary, Butler's term "performativity" refers to gender expressions that have been reinforced through repetition, broadly validated, and normalized into invisibility. Through habit and social conditioning, many people unconsciously demonstrate in public that they are typical boys and men or girls and women with relative ease, but doing so does not mean that gender is somehow biological or genetic. Such linkages are common yet spurious. Examining the ways in which gender is enforced and regulated in society becomes highly evident in cases of people's reactions to gender atypicality, such as that of sissies and teenage tomboys. Daily conditioning results in the appearance of gender as natural and normal when in fact it is constructed and highly regulated across societies and cultures.

Other Narratives and Their Implications for Teachers and Administrators

Rather than being looked at as a condition or syndrome in need of medical or psychiatric intervention, or as mistakes that must be corrected, or even as character weakness, gender atypical children and youth can (and should) be looked at through an alternative set of lenses, ones that recognize gender variance and diversity (Davison & Frank, 2006; Devor, 1997; Meyer, 2011; Walton, 2010). In schools, gender atypical boys should be given options for activities apart from those that are attributed to gender typical boys and should be recognized for achievements beyond masculine domains such as team sports (Martino & Pallotta-Chiarolli, 2003; Rofes, 1995). In schools and out, gender atypical youth can and should be supported rather than ostracized. They need not feel shameful or inferior because of their gender atypical presentations and interests. Drawing from an example in popular media, Jack McFarlane (played by Sean Hayes) exemplifies *sissy pride* on the TV show *Will and Grace* (1998–2006) by holding his head up high as he prances throughout New York, as does Emmett Honeycutt (played by Peter Paige) throughout Pittsburgh in the US version of *Queer as Folk* (2000–2005). Although men rather than boys, the characters of Jack and Emmett potentially serve as positive role models for boys who do not fit within mainstream notions of what it means to be a boy. Apart from fictitious characters, the Radical Faeries (radfae.org) also celebrate and express their femininities.

Letts (2005) observes, however, that "cultural representations of sissies as children and young adults are far less prevalent, particularly sympathetic or positive [ones]" (p. 796). Films such as *Ma Vie en Rose* (1997) and *Running with Scissors* (2006) depict sissy boys with dignity and sensitivity. The ABC news program 20/20 in their documentary called *My Secret Life* (Gutman, 2007) did likewise in interviews conducted by Barbara Walters of transgendered children, some of whom had been vilified as sissies and negatively labelled as tomboys.

Media depictions of trauma inflicted from the abuse of others towards those who are gender atypical or LGBT sparked the "It Gets Better" campaign in the United States, launched in 2010 by Dan Savage and his husband Terry Miller as a response to what was widely represented as a wave of suicides of young gay men and those perceived as gay (see itgetsbetter.org). From what began as one video that offered to message to gender and sexuality minority youth that life does get better after high school, the *It Gets Better* channel on YouTube.com has amassed over 22,000 videos with a similar message, many posted by media celebrities as well as one from Barack Obama, President of the United States.

The campaign has been controversial not only because it has garnered criticism from right-wing religious leaders but also because, as youth themselves have pointed out, children and youth who are bullied routinely because of their gender presentations (conflated with being gay or lesbian) should not have to wait for their situations to "get better". Rick Mercer, Canadian comedian and host of *The Rick Mercer Report* (rickmercer.com), challenged all LGBT adults in one of his weekly "Rick's Rants" to come out and be visible so that LGBT youth have role models and can see through such modelling that, not only will their situations improve over time but they can be better now. In response to the 300 suicides that took place among youth in Canada in 2011, he put it quite emphatically in his rant of October 25, 2011 that,

> It's no longer good enough for us to tell kids who are different that it's going to get better. We have to make it better now. That's every single one of us, every teacher, every student, every adult has to step up to the plate. And that's gay adults, too … the problem is, adults, we don't need role models. Kids do. So if you're gay and you're in public life, I'm sorry, you don't have to run around with a pride flag and bore the hell out of everyone, but you can't be invisible. Not anymore. [see the full rant http://www.youtube.com/watch?v=Wh1jNAZHKIw]

Building on Rick Mercer's challenge, lesbian and gay adults and straight adults, particularly those in schools, also need to, using his words, "step up to the plate" and speak out against bullying on the basis of difference including gender and sexuality. It is morally and legally incumbent upon teachers and administrators to ensure safe schools for all students (Meyer, 2009, 2011). Media can provide pathways for thinking of other narratives of gender aside from the dominant one that regulates the gender performances of everyone (Schrader & Wells, 2007). As adults in school settings, it behooves teachers and administrators to consider gender not as a simplistic duality but as a complex set of social arrangements that create divisions between insider and outsider, often expressed through forms of violence such as bullying and genderbashing, to use Namaste's (2006) term. Lugg (2003) points out that unfortunately, "ignorance of these contentious areas has been the cultural norm" (p. 96), among researchers, to which I would add teachers and administrators particularly in geographical locations where conservative ideas about gender norms are deeply entrenched in the local culture, often validated through traditionalist religious beliefs and practices.

As a topic of continual debate and discussion, bullying is now widely considered to be unacceptable behaviour in schools. Programs and policies are designed to change such *behaviours* (rather than ways of thinking, contrary to those who decry that "political correctness" tells them what they should think and believe). Its status as a significant and continual problem in schools is implied in the proliferation of discourse on bullying in research and policy. As an indicator of how bullying has become highlighted as an urgent problem in schools, for instance, consider the *Bullying Prevention Summit* held by US President and First Lady Obama that was web streamed live from the White House on March 10, 2011. Amidst most of the concerns expressed about bullying in the Summit and elsewhere, very little of it addresses norms and expectations about gender as a platform for bullying. Here, then, I advocate a rethinking of essentialist assumptions about gender and propose how doing so is a crucial component of creating safer schools that do not perpetuate the lessons that have been, and continue to be, learned in schools and society.

To state the obvious, schools are places where students learn; learning is most recognized as an outcome of prescribed curriculum. Facilitating school safety requires not just discussions about "homosexuality" sequestered within health curriculum but a broader approach that shapes curriculum in ways that are inclusive of gender atypical people as well as gay, lesbian, and bisexual people and families that are not reflected in the hegemonic conceptualization of "mom, dad, and 2.5 children". Simply put, curriculum must be inclusive of gender and sexuality variant children and youth (Koschoreck & Tooms, 2009), and educators concerned about social justice issues in education must grapple with LGBT topics, and all forms of social difference and marginalization, to foster safer spaces in schools (Capper et al., 2006). Anything less is tantamount to fraudulence (Capper et al.) and "an act of abandoning students that [sic] are marginalized by the everyday inequity of gender discourses" (Davison & Frank, 2006, p. 162).

Recognizing and working against such inequity is useful and important, but not sufficient. Typically, "diversity" discourse focuses on race, ethnicity, and culture, giving gender and sexuality identities only quick mention if mentioned at all. Through administrators' education and professional development opportunities for teachers, educators must be more adequately prepared to support gender atypical children and youth (Capper et al., 2006; Greytak & Kosciw, 2008) in combination with racialized and cultural identities (Kumashiro, 2004; McCready, 2005). National surveys from the USA (Kosciw, 2004) and Canada (Taylor et al., 2008) indicate that gender atypical youth are more likely to be the target of harassment and bullying than their gender typical counterparts. One of the compounding problems raised by Currier (2011) is that Westernized terms such as "gay" and "lesbian" are considered offensive in cultures such as those in Namibia and South Africa where public discussion about gender and sexuality diversity contravenes social convention.

Some targeted youth demonstrate resilience in the face of unsafe learning environments. Far from being passive victims, some assert their right to be out and visible in school (D'Augelli & Grossman, 2006; Holmes & Cahill, 2005; Ream & Savin-Williams, 2005). Further, a national survey on homophobic and transphobic violence in Canadian schools showed that some, "[c]ourageous LGBTQ students across the country have decided not to let their fear or anyone else's stop them" (Taylor et al., 2008).

Such resiliency and resistance are laudable. However, it should not be left up to students alone to protect themselves or enact social change in schools. Trustees and school authorities need to take more responsibility in creating and adopting proactive and preventative efforts to curb bullying in schools (Lugg, 2003; Meyer, 2009, 2011; Walton, 2010, 2011) and educational leadership preparation programs need to prepare educational leaders for social diversity in all of its dimensions, including gender and sexuality identities (Tooms & Alston, 2006). In short, violence against gender and sexuality difference, among other forms of violence against difference, should be named in policy because, as Macgillivray (2004) points out, homophobia proliferates among children and youth – and sometimes among administrators and teachers. Doing so may risk inciting judgment from some, such as parent groups, but school authorities need to muster up the courage and take the risk if "safe schools" is to be legitimately claimed (Walton, 2010).

Supporting a Gay-Straight Alliance (GSA) is one strategy for enhancing safety in schools. GSAs are student-led and student-run groups in middle or high schools that provide support for LGBT students, straight allies, and students with LGBT family members and friends (Gay, Lesbian, and Straight Education Network (GLSEN), 2005; Griffin, Lee, Waugh, & Beyer, 2005; Macgillivray, 2007). Predominantly a North American phenomenon, GSAs also exist, albeit in smaller numbers, in countries such as Mexico, the Netherlands, the United Kingdom, and New Zealand. To navigate and steer away from opposition from school administration and conservative parent groups, student groups exist in some schools to serve the same purposes as GSAs, but they may be called Pride Alliance, Diversity Club, or Spectrum, among other titles.

It is not only morally and ethically necessary but also legally astute to foster cultures in schools that support the diversity of the student population. The ruling of the Supreme Court of Canada in the *Jubran vs. North Vancouver* case, for instance, indicates that school districts are obliged to curb behaviours such as homophobic violence and to create learning environments that are free of discrimination (Meyer, 2006). In abbreviated form, the facts in the Jubran case are that between 1993 and 1998, Azmi Jubran was routinely bullied in his North Vancouver school, located in southern British Columbia (BC) on the west coast of Canada. Much of the violence, both verbal and physical, was homophobic in nature despite Jubran identifying as straight. His struggle to hold the school accountable for the ongoing violence he endured was a process of filing complaints and appealing rulings. First, he filed a human rights complaint. Then, the BC Human Rights Tribunal ruled in his favour, but their ruling was overturned by the Supreme Court of BC. Next, Jubran appealed to the BC Court of Appeal, which upheld the original ruling of the BC Human Rights Tribunal. Finally, the school district appealed to have the case heard in the Supreme Court of Canada, which refused to hear the case. In the end, the North Vancouver School District was held accountable and responsible to deal with problems such as homophobia in a systemic and proactive manner. According to Findlay (2011), victims of bullying and their parents are increasingly taking teachers and administrators to court for lack of effective policies and practices that are informed by such policies.

To repeat the point, policies that identify violence, including but not limited to homophobia, against gender atypical youth are rare in schools. Even more rare are schools and classrooms that are created specifically for LGBT students. In North America, schools such as the Harvey Milk School in New York, Oasis and Eagles in Las Angeles, and the Walt Whitman Community School in Dallas "were created for youth whose neighbourhood schools are unable [or unwilling] to safeguard them or lacked resources to support their sexual orientation" (pp. 160–161), according to Campos (2003). He adds that, "without these schools, the future of some youth would be bleak, dismal, and unsuccessful" (p. 160). In Canada, the only equivalent school is the Triangle Program of the Toronto District School Board. According to their website, the Triangle Program is committed to "providing a classroom where LGBT youth can learn and earn credits in a safe, harassment-free, equity-based environment, and developing and teaching curriculum which includes and celebrates LGBT literature, history, persons and issues" (Triangle Program, n.d.).

Students who are able to attend these schools are fortunate in the sense that they can study and learn in environments that are safer than regular schools when it comes to hostilities against gender and sexuality variation from the norm. However, such schools and programs do not compel school districts to curb or educate about homophobia nor are students anywhere else in Canada besides Toronto able to access such programs. Clearly, then, administrators and teachers need to do a more concerted job of educating themselves about violence on the basis of gender atypicality. Pre-service teachers in Bachelor of Education programs need to be educated by informed faculty of their moral and legal obligations to all students, even those whom they find objectionable because of gender and sexuality difference.

Addressing oppression against gender minorities is not an easy task, particularly in some non-Western societies and in other locations that are characterized by conservative values about gender. Such values maintain a sharp and clear categorical division between boys and girls and men and women, foster gender presentations that represent such divisions, and validate public sexualities that are demonstrably heterosexual. As Rottman (2006) indicates, "homophobia and heterosexism continue to haunt public schools today through educational policy, the climate for sexually-minoritized individuals, and leadership and governance structures" (p. 2). It may be useful to consider community consultation and forging community alliances to create a "social collective" (Boske & Benavente-McEnery, 2010, p. 373). However, the risk of such a collective is that it may reflect dominant voices while marginalizing, or even failing to recognize, other voices. Boske and Benavente-McEnery acknowledge that schools in North America and other Western regions of the globe have become more "racially, linguistically, religiously, and culturally diverse" (p. 369) to which I would add: in addition to diversity of sexuality and gender identity that confounds dominant paradigms of gender and the regulation that tends to accompany such paradigms. Further, Tooms and Alston (2006) point out that while acknowledgment of student diversity has expanded in some regions to recognize gender and sexuality diversity, educational leadership has, on the whole, not kept pace in leadership preparation programs.

Depicting curriculum and policies in schools that address violence against gender atypicality as "corrupting children", as the so-called *Institute for Canadian Values* did through the *National Post*, is social bigotry disguised as "values" that operates among religious fundamentalists and is disseminated by them. It also operates less obviously in daily experiences of children and youth who are continually placed in emotional and physical danger through no fault of their own in the very places where they are expected to learn.

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Chapter 41
Zimbabwean Women Primary School Heads

Irene Muzvidziwa

Purpose

This chapter focuses on the role of educational leaders in creating enabling socially just educational environments. One of the objectives is to provide an awareness of the gendered nature of division of labour in educational settings which historically defined women's position in a negative manner. The chapter seeks to provide new data that would make meaningful contribution to the field of educational leadership. Views of leadership that used to justify patriarchal dominance and cultural barriers in education by considering authority, power and the division of labour as both neutral and essential are examined. By ignoring the inequalities of organisational power, leadership theory neglects the significance of gender. In this write-up, the theory that moves away from traditional organisational setting and its 'simplistic recipes' for effective leadership is arguably the notion of leadership for social justice. Rawls (2003) challenged society to develop a sense of justice in its members.

Background

The notion that patriarchal norms emphasises gender differences and men endeavour to preserve their status by restricting women's opportunities to senior positions is a global trend (Addi-Raccah & Ayalon, 2002; Cheung & Halpern, 2010; Madsen, 2007; Peter & Horn, 2005). While internationally, discriminatory practices against women have been experienced in different ways, this chapter draws its examples

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mostly from Zimbabwe, one of the Southern African Development Community (SADC) countries of sub-Saharan Africa, to demonstrate issues of power prevalent in previously male-dominated school organisations. The absence of theory that would offer new ways of understanding and perceiving power in educational institutions will be part of the debate. Like other developing countries, Zimbabwe has a rich diversity of cultures rooted in tradition and patriarchal values. Extending further, literature shows that men have dominated the field of education (Enomoto, 2000). Patriarchy in this chapter is used to describe the power structure which underlines social, political and economic systems as well as cultural and religious beliefs in most societies.

Before Zimbabwe's independence, schools were dominated by racial discrimination and later the discourse diverted to black male-female inequalities. Little attention was given to gender issues. The norm was that girls were mostly prepared for marriage. From the late 1970s, issues emerged concerning women's careers which reflected women undertaking training in the lowest level of teaching profession such as infant and domestic science areas (O'Callaghan & Austin, 1977). Men dominated higher level teacher training. The notion of normalisation, and the parents' perceptions of what is termed normal, is the key factor that contributes to the girls' educational success or lack of it and in a way was and/or is still being reinforced by the way in which we are positioned by our own parents and the society at large. When the Zimbabwe government introduced free education to eradicate educational inequalities that existed during the colonial period, the rate of expansion of schooling in the first decade of independence 1980–1990 was phenomenal, but gender was still not an issue in educational policy (Gordon, 1994; Chikomba, 1988). Gender imbalances continue to exist in educational leadership even today. To pursue my argument on leadership for social justice and the issue of gender, I begin by exploring issues surrounding gender and educational leadership. I further focus on the concept of gender stereotyping in education that has led to the under-representation of women in positions of authority and how education has served largely to maintain the 'status quo' in gender relations, reflecting on continuing inequalities in male and female access to power and resources in the wider society. The purpose is to illuminate the injustices central to the highlighted concepts. It would seem difficult to define social justice in terms of both theory and practice in educational leadership. To demonstrate this, I reflect on how patriarchal norms and values strengthen and emphasise gender differences and how men's dominance in leadership positions is perpetuated through societal values.

Rationale

My early experiences have had a strong bearing on my interest in understanding the forces that deny, for instance, Zimbabwean African women's educational opportunities, let alone, being in positions of authority. My status as a teacher, and later a senior lecturer, was achieved after a struggle. I grew up in a rural farming community.

Being the second born child in a family of six children, four boys and two girls, my education was cut short at an early age after 2 years of secondary education. This was simply because my elder brother who was the first born in our firmly had decided to end his education at form two level. According to my thinking, this was not fair. The kind of issues and questions that preoccupied my mind after this incident could be best understood in the light of my own history and educational background. What has been the trend in developing countries is to value sons more than daughters. My parents, like most African parents, did not consider educating girls as an investment and hence could not let their daughters be more educated than the son. For me there was no social justice practised between us as children. This however was also pointed out by Hill and King (1993) who observed that parents' socio-economic background and attitudes about educating girls contribute to educational success or lack of advancement of their daughters. What the parents value in relation to their children's future, to a certain extent, determines the level of education the children will get, especially girls. Social justice issues, especially relating gender and educational leadership, have historical roots, not only in Zimbabwe. Mathur-Helm (2005:60) discussing issues of equal opportunity and affirmative action for South African women, 'women continue to face barriers to their career advancement'.

Social Justice

Justice is fairness in the treatment of people or persons irrespective of their status in life. Although the issue of equality is part of an exercise towards ensuring justice, Hoy and Tarter (2004:252) argued that 'treating everyone equally is not equal. Individuals have different needs and talents; thus rigidly treating everyone the same is not equal'. A good example is reflected in my own experience highlighted above. It is the quality of being just or fair that counts. Social justice has something to do with an ethic of caring and empathy and being sensitive to human rights and gender. Gewirtz cited in Theoharis (2007) sees social justice as a process of recognition and acknowledging the institutional injustices and trying to empathetically re-dress them. Women's under-representation in educational leadership, for instance, though not the focus of this chapter, has something to do with the marginalisation of women that requires certain adjustments to be made if women are to receive equal employment opportunities and appreciation from within the communities and society. This is why, for instance, Bogotch (2002) contested that social justice definition is inseparable with educational leadership. If men are socialised not only to be public holders of power but to own and control major resources of a society in which women are taken to be part of those resources, then consciousness raising is critical to create an awareness of the importance of women's leadership in schools. Goldfarb and Grinberg (2002) had similar thoughts about social justice as they perceived it an active exercise, an involvement into transformational processes of promoting fairness in the way resources are shared socially, economically and educationally. For the purpose of this chapter, I confine myself to social justice definition that addresses and eliminates marginalisation of women in educational leadership and takes into account the issues of gender and education and the practice of patriarchy that strengthens institutional injustices. Although issues of gender and justice in leadership affect many nations as would be highlighted, examples in this chapter will be drawn mostly from the Zimbabwean context.

Gender and Education: Foundation for the Formation of Moral Justice

In Zimbabwe the teaching of morals starts at home where boys and girls perform different duties and are always reminded to behave within the expected norms. The school then serve as agents of society by transmitting the values of society to the pupils. In textbooks, women and men are portrayed according to culturally accepted gender role definition, that is, women as mothers and housewives and men performing outdoor activities (Sharma, 2000). If the problem starts from home, the question is 'How can educational leaders create enabling socially just educational environments?' Similar trends have been observed in other African countries (McFadden 1997) as demonstrated below.

In South Africa black women have faced and are currently facing a dual challenge in attaining top management positions (Booysen, 1999). This is simply because gender in South Africa is racially and culturally segmented as it takes on a particular apartheid-related characteristic, thus marginalizing all other forms of discrimination creating inequality among black and white women (Mathur-Helm, 2005:66). This was the situation with Zimbabwean women before independence. In Tanzania, "women are poorly represented in the decision-making structures" in senior management positions and other areas within the employment sector (McFadden, 1997:31). A similar situation was observed in Kenya where women, as elsewhere, are under-represented in leadership positions.

When I went to New Zealand to pursue my studies, I undertook a course in Women and Educational Leadership. This course greatly assisted me in developing an awareness of the problematic nature of gender and educational leadership issues not only in developing countries but also in Western societies. Literature shows that for both developed (Acker, 1994; Blackmore, 1998; Court, 1993; Cubillo & Brown, 2003; Shakeshaft, 1999) and developing countries (Chitiga, 2003; Dorsey, 1996; Gordon, Swainson, Bondera, & Kadzamira, 1998; Kark, 2004; Mathur-Helm, 2005; McFadden, 1997; Oplatka, 2002), women are marginalised and under-represented in positions of authority in educational settings. Male dominance has been observed in 'top' leadership positions where women populate the lower levels of teaching (Acker, 1994; Blackmore, 1998; Court, 1993; Shakeshaft, 1999; Shakeshaft, Brown, Irby, Crogan, & Ballenger, 2007; Smulyan, 2000). In another study, a publication by Wilson (2004) examined the situation of women in educational management in Europe from the 1990s. Her book exposes prospects of women's promotion in the education professional field, the obstacles to progress in that area and women's overall situation.

She argued that gender was treated as a marginal issue in the literature on school leadership, yet 'teaching represented one of the most highly feminised of all professions', and in many countries it has been one of the few traditional avenues for female advancement. A similar situation existed in New Zealand as evidenced by O'Neill's (1992:62) assertion that 'gendered-type' subject areas led to a limited range of 'gendered career opportunities'. The issue of opportunities relating to girls and women has been well articulated by Okin (1989:18) who argued that, 'the family is a crucial determinant of our opportunities in life of what we become', just as attested by the author of this chapter through her background history. Through this reflection issues concerning school organisations and the problematic nature of gender are portrayed. The major question is how best can social justice be enacted to create socially just educational environments? It is the responsibility of both the school and the family to work together towards building a community of practice that has respect for one another and value all human beings irrespective of gender, race or colour.

Family and the Formation of Morals

In pursuit of the social justice issue, Okin (1989:22) sees the family as the first 'series of associations' in which individuals participate and from which people acquire the crucial capacity of a sense of justice, to see things from the perspectives of others. She believes that the family is important for the moral development of individuals, especially the development of a sense of justice that grows from sharing the experiences of others and becoming aware of the points of view of others who are different. Approaching the issue from this observation, it can be argued that, if the family is the foundational institution in the formative of moral development, and if the school serve as the agent of society, then structures and practices of the family should be well connected such that the larger society respects the human rights in relation to gender – if a sense of justice is to be fostered and maintained. Okin's belief seems to suggest that almost every person in society starts life in a family of some sort, and while the nature of the family varies, it is the potential place where people through socialisation learn to be – or not to be – just, hence the importance of schools needing to collaborate with its community and parents in a transformative way, in order to develop in children certain moral values. It is also essential that children who are to develop into adults with a strong sense of justice and commitment to just institutions spend their earliest and most formative years in an environment in which they are loved and nurtured and in which the principles of justice are practised.

Theoretical Framework

A theoretical and conceptual framework for this chapter is underpinned by literature on women and educational leadership, focusing on society as one of the contexts in which the experiences of women can be explored. Maddock (1999) and Wacjman

(1998) emphasise the need to tie in the cultural obstacles women leaders face in organisations with what they experience in their daily lives. Given that historically, schools have been organised in bureaucratic ways and in which authority has been considered as legitimately accorded to the principal, who generally used to be male (Blackmore, 1998). The traditional leadership and organisational theory – being the dominant paradigm – provides the context from which mainstream leadership will be analysed in this chapter, against leadership for social justice. In addition, now that women increasingly enter leadership roles that traditionally have been occupied by men, and the relationship between gender and transformational leadership theory with its emphasis on empowerment of followers has gained momentum in literature on leadership (Kark, 2004), although it is a neo-charismatic leadership theory, transformational leadership is considered in this framework since it recognises 'employees' creativity skills' (Birasnav, Rangnekar, & Dalpati, 2011).

Transformational leadership conception originated most visibly in Burns' (1978) work concerning transformational political leader who used transactional approach to leadership. For Burns (1978:3) transactional political leader 'approached followers with an eye for votes or subsidies for campaign contributions… such transactions comprised the bulk of the relationships among leaders and followers'. Drawing on Burns' theoretical ideas, Bass (1985) developed a model of transformational leadership which conceptualised transactional and transformational forms as separate but interdependent dimensions. Within the transformational approach, four distinct components identified include idealised influence, inspirational motivation, intellectual stimulation and individualised consideration. As mentioned before that in this chapter, leadership for social justice is that which departs away from the mainstream leadership thinking which views a leader as extraordinary, marginalising followers – but takes into consideration leaders who value those around them, motivate and inspire them. Thus, Bass's transformational leadership is quite accommodative and, as part of the framework, provides a platform for employees to communicate and in the process improve their capacity to think creatively. Unlike the traditional theories of leadership, the traits approach has been challenged for failure to address a number of issues in leadership including social injustices in organisations. The field of leadership is seen as gendered in favour of men as Enomoto (2000:376) contended 'to argue that management is a gendered construction is to posit that there is one gender (male) that defines and dominates the discourse in the field of study', and thus, there is no social justice. As Taylor's scientific management treatise established him as the 'father' of industrial management, his managerial theory emphasised standardisation and expertise in large organisation. Linked to this argument is the notion that trait theory privileged traits associated with male leadership (Smulyan, 2000). Leadership and management have been conceptualised by focusing on traits associated with males such as 'strength, toughness and decisiveness' (Eisler, 1994:38). Women's apparent lack of such traits as perceived in their behaviour is seen to make them unsuitable for leadership (Blackmore, 1998). Literature on traditional approaches to leadership shows how leadership and management theory has shaped the assumptions, beliefs and values that have become the underpinnings of leadership and organisational theory. From

Blackmore's observation women are in a double bind. Chapman and Luthans reinforce this point of view in their observation that:

> If a woman displays the culturally defined traits of femininity (being emotional, nurturing, intuitive or submissive) she is perceived to be a poor leader. If she acts according to the male role definitions of a leader (being aggressive, achievement oriented, self-confident, forceful or competitive) she is condemned as being 'unfeminine'. (cited in Blackmore, 1998:100)

In view of the above, transformational leadership theory was considered as one of the alternative views (Hau-Siu-Chow, 2005; Rosener, 1990). Its particular focus on empowering and developing followers' potentials is in line with this chapter's concern for the creation of leadership for social justice. Leadership theory has implications for what goes on in schools and how leaders evolve and enact leadership practices. Hence, transformational leadership with its emphasis on promoting employees' innovative and creative skills stands to bridge the gender gap of male-female role definition of leadership approaches. It thus celebrates the uniqueness of each human as a resource, and in this way, social justice is enacted.

If any concept of leadership deals with exercising influence on others through social interaction, it follows therefore that to examine leadership that would create socially just environments, there is need to understand the nature and quality of social interactions involved. Mothers, for an example, as leaders, intentionally seek to influence the behaviours of their children. Likewise, women leadership approaches should not be despised but celebrated if the outcomes of their interactions are progressive. McGregor (2010) on her reflection, on the role of gender research, argued that the status of women in senior management is linked to the kind of treatment they receive nationally and internationally, suggesting that if they are marginalised in both private and public sectors, they might as well be disadvantaged anywhere else. For instance, history is replete with the story told from a male perspective only and the area of leadership is not an exception. Thus, in this study, women's leadership experiences were explored from a phenomenological approach using the perspectives of women to understand the meaning in the context of their lived worlds as school leaders.

Methodology

The study from which findings of this chapter were drawn was restricted to one province outside Harare, the capital city of Zimbabwe. Eight women school heads were interviewed. A purposive followed by snowball sampling was used as the chief sampling technique for selecting research participants. The criteria for selection was that research participants for inclusion in the study should have the experience relating to the phenomenon, that is, be educational leaders, verbally fluent and able to communicate their feelings, thoughts and perceptions about the phenomenon to be researched. While an eclectic phenomenological approach was adopted, the main data-gathering tool in phenomenology is the in-depth, semi-structured interviews (Van der Mescht, 2004). The inquiry was initiated through open discussion and conversation, with questions flowing from the dialogue as it unfolded. However, the use of phenomenological method was a deliberate commitment to an understanding of the social meaning of women primary school heads' lived experiences. Although phenomenological analysis has something to do with meanings in contexts and emerging of themes from research participants, its analysis does not go beyond interpretation; hence, my presentation in this chapter takes a different approach.

With the approach that was adopted in analysing data, issues that emerged from the study included lack of acceptance of women leaders by both male and female teaching staff and the assumption that leadership is for men was linked to women's lack of aspiration. However, my argument, in line with Blackmore's (1998) contestation that the dominant research approaches to leadership, presents 'seemingly neutral and unproblematic accounts that ignore issues associated with gender inequalities, organisational power differential and organisational politics' (Ford, 2005:241). To examine further the issue of justice and gender relating to educational leadership, a critical approach was adopted, to analyse the impact of organisation theory in the field of leadership. Women leaders and feminist researchers (Blackmore, 1998; Chiu & Walker, 2007; Enomoto, 2000; Ford, 2005; Shakeshaft, Brown, Irby, Crogan, & Ballenger, 2007) perceive the dominant discourse as denying individual differences, ignoring context and giving little or no consideration to the influence of diverse settings within which educational leaders and subordinates operate. Feminist researchers have modified and created important ways of viewing the world through consciousness raising or specific policy recommendations and in a way contributed to social change.

Findings

The main themes that emerged from the participants were linked to women's roles as educational leaders and how they perceived power. While a number of themes emerged in bigger project of the study, this chapter focuses on the constraining factors the injustices experienced by participants and how the women responded to the challenges and, in the process, enacted the ethics of caring and nurturance in their approach to leadership. The first challenge which emerged as one of the important themes was resistance to women leadership. The participants linked this to both the organisational structures and culture of society, since they were the first group of women to be appointed as school heads after Zimbabwe's independence in 1980.

From the participants' discussion of how they responded to the challenges emerged another broad theme, reshaping the school's 'culture' in order to bring about social change within the school community. Although the women did not mention directly the type of leadership they enacted, grounded in the findings were themes such as nurturance, creativity, caring and empowerment. Drawing from Theoharis' (2007) article, we are informed that social justice leadership goes beyond just being good leaders but sees it as a process of exercising and practising good morals, being sensitive to issues of fairness and having an ethic of caring and empathy. These concepts link well with the themes that emerged in the study of women school leaders, as major approaches that facilitated their breakthrough in the creation of favourable atmosphere within school environments such as those in Zimbabwe. The women's descriptions of their experiences of handling challenges as they felt were like shaping the culture in a different way. It is from these broad themes that the issues of social justice are clearly reflected. This study brings to the fore complexities of educational leadership, social justice and equity issues within the field of education particularly contexts such as that experienced by the women school heads in my study.

The study from which the findings were drawn was an interesting one in that the women interviewed were the pioneer group to be in educational leadership positions after Zimbabwe's independence in 1980. The major questions the women focused on in their responses were: 'How did you get your promotion to the level where you are?' 'What was your first experience in this position?' 'How did you handle the different situations that you came across?'

All of them acknowledged that their promotion was a response to an advert. According to their understanding, not many had applied or responded to the advert in most regions. When they were appointed, they all were deployed as deputy school heads. For the sake of this chapter, I will focus on just one (Enita – pseudonym) of the participants. My reason for choosing this particular one is that she did not see herself in isolation as reflected in her introduction. Enita said:

> At first I was excited and felt I had done a great achievement. Unfortunately we were the first group of women to be in headship positions and as a result, we received a great deal of resistance and that was a big challenge (direct quotes from Enita)

When Enita assumed the leadership position, she thought she would just fit into the system like the male leaders did. When she was not accepted as a leader within the community that is when she realised, leadership was perceived as a domain for men and not women. She went further to elaborate on her experience still in plural terms:

> On our arrival as a substantive deputy heads both the acting heads and the heads did not like it… In my case, 'I was more of a rubber stamp.' The head and the 'so called deputy head' would discuss school issues without telling me or consulting me. The head could lock the office when-ever he wanted to go somewhere and give the keys to an ordinary teacher without even telling 'you' that he will be away. He did not want to accept my presence as his deputy. (direct quotes from Enita)

If leadership for social justice was being practised in those schools, it would have meant women's deployment in schools could have been accepted with recognition and respect and not resistance. In Zembylas' (2010) article on 'The emotional aspects of leadership for social justice', although its focus was on implications for leadership preparation, it articulated on tensions involved in leaders' struggles for equity and justice in schools. It highlighted the importance of emotional tools during times of turbulence like the ones faced by both females and male leaders discussed in this study. The women's entry into leadership positions was a radical move by the Zimbabwean government, an unplanned change process that was happening in these schools. It became a challenge to both parties as it needed change of structures and cultures, women venturing into male domain and the community in their life time for the first time seeing a woman trying to lead. It came as a culture shock that needed both the community, the acting heads and deputies to embrace and enact leadership for social justice. Theoharis' (2007) definition of social justice leadership as leadership which promotes social inclusion and respect for others, care and equity clearly shows that if justice is to be enacted in schools, historically marginalised issues should be considered seriously.

Working as deputy heads was more challenging than when they were promoted to headship positions. However, even then, when they had been promoted, their arrival to the new schools for their principalship post was not that easy. Resistance still existed, as Enita articulated:

> At this school there was no hand over take over. Before I came to this school, there was an acting head who, pretended to be good when he heard that I was coming to head the school. Yet he was busy writing letters to all responsible authorities and offices influencing them not to accept me. I was shown the copy at the Ministry of Education which had signatures of the School Development Committee (S.D.C)members saying that they do not want a woman head they wanted the man who was acting. (direct quotes from Enita)

These findings led me to reflect on the structural and cultural inequalities that seem to perpetuate the injustices in school organisations. Chiu and Walker (2007:733) argue that: 'school communities are unlikely to become more sensitive to issues of social justice unless the formal processes and structures which restrict equity are changed'. If the community as a society perceived women as leaders and valued them as such, they would not have been manipulated to the extent of endorsing their signatures supporting issues reflecting injustice in an organisation.

Enita added acknowledging that:

> When they showed me the letter they said they just wanted me to know the environment that I was going into. So I was told to 'pretend' not to know anything about that and I did that.

Although it is true that discrimination towards women in organisations exists, what is worrying is that it persists in different forms. This observation is also echoed by Fletcher (2010) who highlighted on the importance of identifying the kind of gender stereotype a culture holds. Looking at Enita's scenario, one gets the impression and convinced that social justice should be a concern with addressing issues on marginalisation and exclusionary processes – educational leadership not an exception, within educational environments (Bogotch, 2002; Gewirtz, 1998; Goldfarb & Grinberg, 2002; Theoharis, 2007). In the case of Enita, the information that the previously acting head and the community was not in favour of her coming to that school, while insulting, helped her to think of a strategy to find her way forwards as she indicated:

> I started by calling the School Development Committee members. I introduced myself to them knowing that they don't want me. Because they thought I did not know anything about their story behind their letter, they welcomed me as if there was nothing. (direct quotes from Enita)

Drawing on Zembylas' (2010) concept of emotional tools in the fight for social justice, I see women in this study handling their emotions in a unique way and creatively applied to bring the community and the school together. As mentioned before that the move to address inequalities that existed before was in fact a radical change, Enita presents a lived experience journey of the change process and its complexities, as she notes:

> I approached the chairman of the school development committee and he took me around showing me the school, but there was no hand over take over. No financial records for the school, no water … the taps were locked … no electricity and yet the school used to have electricity. Some of the buildings were falling. (direct quotes from Enita)

Automatically, a number of issues can be seen unravelling themselves from this type of community. Induction into the system and mentoring was not an option, it was not featuring. Chiu and Walker (2007) focusing on Hong Kong and looking at social justice and leadership in schools contented that the meaning of social justice is not static but contextually specific and societal based. In the case such as that of Enita, access to information and resources was barred. The previous leadership did no justice to the woman head. In women's vocabulary the terms creativity, nurturance and empowerment emerged as themes from the data. One of the ways the women in this study used to overcome challenges they faced in schools was creativity. They developed mechanisms of interacting with everyone within the school community starting with the senior teachers, the responsible authorities and the community. Enita concluded:

> With the support of the responsible authority and the senior teacher, I worked my way out. The water was unlocked and the electricity re-connected. I asked for permission from the responsible authority to start my own new records and he gave me a go ahead. I made progress. (direct quotes from Enita)

While the women did not even mention the term justice, their emphasis on bringing together the school and the community, pulling together and involving the senior teachers, reflects leadership with moral values. It reflects leadership that respects and in the process people feel included, and they result in taking ownership of the different activities within the school. In my introductory section, I made it clear that the definition for social justice in this write-up is taken to mean views that are not discriminatory. Leadership for social justice is therefore perceived as those forms of leadership that reflect a shift away from the traditional notions of power as control or as the domination of decision-making. In women's approaches to leadership, though they are perceived as passive, their impact is slow but effective. Capper, Theoharis, and Sebastian (2006) in their framework for preparing leaders for social justice raised an important issue about principals needing skills to empower staff through setting up structures that facilitate collaboration and shared decision-making. In a similar manner, women in this study were concerned with communitarian and collective activities which is an approach that steered up their followers towards self-development. The emphasis on reciprocity, shared responsibilities reflecting values of love, nurturance and involving others through creative mechanisms, is what characterises empowerment. Enita brought the community closer to the school through good communication skills. One of the challenges she struggled with as she mentioned was that:

> The school was a farm school and had children from surrounding farms but those children were not contributing anything to the school. I tried to find out what exactly was happening…

> I talked to one of the farmer first… The parents could not afford to pay fees for their children. …So I approached the farmers surrounding the school on behalf of the parents, so that the farmers pay the fees and uniforms for the children and hold back part of the parent's money every month until the bill is over. I called the parents and discussed the issue with them highlighting the advantages of this approach to handling their financial challenges. Parents indicated that transparency was a missing factor which they believed would be addressed through the discussed approach to solving their fees and uniform problem. (real story from Enita)

Leadership for social justice is leadership that respects the integrity of others and is sensitive to moral values issues. Although this approach involved a lot of movement, it necessitated the participation of every stakeholder, and as a result, the school gained support from the whole community. Enita's story continued thus:

> The parents were taking the children to work in the farm fields leading to frequent absenteeism from school. So I had to approach the farmers again to discuss the issue of child labour and abuse since they were employing these small kids leaving them with no time to go to school. Some were baby-sitting while parents were going to work. It was an issue of educating the whole community. It took us about 3 years for the community to conform, but at least progress academically was finally raised. We introduced garden and poultry projects. These projects boosted our school budget that we managed to renovate some of the school buildings. (direct quotes from Enita)

Implications for Research and Practice

Not much research on social justice and human rights has been carried out in Zimbabwe just like many other countries. Education is a human right, however, curriculum consciousness needs to include an accurate history of schooling and articulate the nature of inequality reproduced daily. The forms of inequality that exist can only be detected through more research attempts. Although basic learning begins within the family followed by formal schooling which is a process of developing an individual's potentials, consistent with social values, it is important, however, to recognise that the concept of leadership does not enjoy any ontological status free from the mechanism of society. Hence, despite education being a human right, the issue of moral development of individuals, a sense of justice and an appreciation of others is of importance to be nurtured in both children and adults through the work of educational leaders and their colleagues in schools and the community.

This study does provides not only for Zimbabwe but many other countries a framework on which to build further work in the country that has done so much to educate its population but with little concern for human rights and social justice issues. All gender stereotyping should be somehow eliminated, if a sense of justice and a commitment to just institutions is to be fostered. The importance of theory in educational leadership should therefore not be taken for granted. Since theory seeks to explain practice, it provides leaders with a guide to action and has implications for what goes on in organisations, for instance, in education, particularly in schools. Feminist theorists challenge the emphasis on 'hierarchy and efficiency', such as the approach advocated by scientific management, which has led to the 'myth of a neutral professional educator' (Enomoto, 2000:376). The study demonstrates that nurturance is the theme connecting women's ways of leadership and their ability to empower others for social justice. Success of women educational leaders in this study depended mostly on their ability to develop a network of influence and interaction patterns which are different from those exercised from within the mainstream leadership approaches.

Transformational Leadership and the Practice of Social Justice

Bass' (1985) model of transformational leadership resonates well with Hurty (1995) power with model of leadership using an interactive approach. From the findings of the study in this chapter, it shows that interactive leadership (reciprocity) encourages participation and arouses enthusiasm for work. In the same way, nurturance of children's growth, treating them with dignity, respect and trust and giving them support and encouragement, require 'reciprocal obligation' (Hurty:389), that is, communicating with others and listening to and learning from their points of view. It was only through talking to both the children and the teachers that the school head got to know the truth about the school situation since no records were archived for information storage. Enita, the school head, did not turn away the children because they could not afford to pay fees. She was innovative and sought to involve the parents to be responsible for their own children in a creative way. The surrounding farmers who were the employers of these parents were indirectly involved in the development of the school since they agreed to open accounts for these parents. The type of leadership reflected in this study was that of the 'servant leader' whose motivation for leadership is the desire to serve (Russell, 2001). Enita as a school head worked together with the senior teachers and retained the dignity of the children. This was demonstrated by showing an attitude of concern for parents' inability to sponsor for the education of their children and an appreciation of pupils, by developing the capacity for listening, eliciting trust. Hurty's notion of interaction resonates with Bass and Alvio's (1994) concept, the transformational theory in that leadership is seen as shifted from simply leading followers to 'empowering them to become leaders through the development of a relationship of mutual stimulation and trust' (Boehnke, Bontis, Distefano, & Distefano, 2003:6). While the women in this study were treated with injustice when they initially joined leadership in schools, they did not assume their leadership roles using the preconceived notions of styles. Given the opportunity to focus attention on the roles and experiences of women who are in educational leadership positions, the educational research community would gain new insights that can be offered for the transformation of schools. Offering new ways of understanding and using power would enhance the opportunity to enact leadership for social justice in schools. Literature shows that:

> Many women in school administration view power as being multi-dimensional and multidirectional and encourage empowerment of all organisational members through the development of communities based on collective values and actions. (Fennell, 2002:100)

This augurs well with the notion of leadership for social justice defined in this write-up. Andrews and Crowther (2002) noted that the past decade has seen major developments in the reconceptualisation of educational leadership for successful school reform. In the similar vein, Hayes, Christie, Mills, and Lingard (2004:520) also place emphasis on those 'forms of leadership that support the development of whole school communities as learning organisations', just as reflected in the study of women school heads. These views about leadership relate well with Lambert's (2000:3) thinking that leadership should be 'embedded in the school community' as a whole because leadership is about 'learning together' and 'constructing meaning and knowledge collectively and collaboratively'.

One of the leading feminists in the field of leadership, Shakeshaft noted that:

> There are scores of great women whose stories lie buried in school historical societies, and in the archives of national organisations. Learning more of their lives may help to shape and understand the knowledge base; at the very least, such research will provide a fuller explanation of the legacy of their early courage and sacrifice. (Shakeshaft, 1999:114)

What Shakeshaft is arguing for in effect is an alternative discourse on leadership. This is in line with Hurty's work, who used the writings of one of the early feminists, Charlotte Perkins Gilman, to posit an alternative discourse about female leadership. Gilman (in Hurty, 1995) argued that the ideal is a humane society, not a patriarchal masculine-dominated one. On this point Gilman raised the issue that Okin (1989) also challenged. Gilman's writings highlighted a methodology which requires a full exploration of women's experience. Her discussion of education places women in participatory and responsible positions. For Gilman:

> The mother is the first co-ordinator, legislator, administrator and executive. From the guardian and guidance of her cubs and kittens up to the longer, larger management of human youth, she is the first to consider group interests and correlate them …. (Gilman, 1911:183 cited in Hurty, 1995:399)

Drawing on the work of Mary Parker Follett (1924) to demonstrate a conceptualisation of power that was intended for practical, participatory strategies in the business community, Follett devoted her life to the study of how people treated each other. This write-up is trying to make sense of the role of educational leaders in offering socially just educational environments. Follett's theoretical work included studies of human interaction, conflict resolution and decision-making in organisations. In her theorising, Follett believed that people grew and changed by talking through conflicts and differences, searching for what each party really needed (Hurty, 1995; Brown, 2004). Such processes of negotiation do not rely on traditional notions of power as control or as the domination of decision-making. The authenticity and integrity of female experiences, often hidden or missing from the public historical record, can be appreciated as contributions to more fully accountable stories of human, social and moral development. Women in Hurty's study got tired, angry, frustrated and shared those feelings honestly with their subordinates. Unlike in this study, for instance, Enita, when she was informed about her community resisting actions on her arrival, might have gotten frustrated or angry; however, how she was supposed to respond and how she managed that were just but fighting with her emotions. Enita still had to work together with that same community which had mixed feelings about her coming. Consistent with Follett's thinking about conflict resolutions or approaches to challenges is Irby, Brown, Duffy, and Trautman's (2002) concept of synergistic leadership theory, synergistic meaning working together. Synergistic thinking in terms of understanding school leadership is important because when people work together in administrative meetings, school meetings, parent-teacher associations and with the community, they have contradictions and different opinions over certain issues, but they still have to come to a common goal. In the same way, Enita did not remain focused on the negative aspect but looked for 'the way forward'.

Leadership for Social Justice

The theory that moves leadership away from its traditional organisational setting and its focus on effectiveness is the notion of leadership for social justice discussed in this chapter. Capper et al. (2006) linked leadership to social justice issues by proposing a framework for conceptualising how leaders can be skilled to sensitise communities for social justice. The importance of community involvement in fighting the issues of social justice is echoed by many authors. In consistent with this thinking is Rawls (2003) observation as explored earlier in this write-up who challenged society to develop a sense of justice in its members. In a similar vein Riester, Pursch, and Skrla (2002) talking about the principles of social justice highlight ideas which augur well with Capper et al. (2006:213) who argue that 'school leaders need to embody a social justice consciousness within their beliefs systems or values'. When the women school head in this study initially entered into leadership positions, there was no gender sensitivity nor social justice consciousness on the part of the leaders and the community they were deployed, as reflected in the type of resistance they encountered. This suggests that leaders within schools should be gender sensitive and morally conscious and treat every human with fairness. However, when these women got the opportunity to exercise their leadership, they facilitated a culture of openness, respect and caring through their interactional patterns and in the process created a socially just educational environment, by letting everyone take responsibility and be involved in the development of the school. By approaching different stakeholders including the farmers and parents, Enita valued them as people who can make a difference even despite parents having poor or children coming from poor backgrounds. Russell (2001) perceives values as core beliefs that stimulate human behaviour. In the same way, Capper et al.'s (2006:212) framework depicts on what 'school leaders must believe, know and do to lead *socially just schools*'.

Bringing the community together is a skill that needs commitment and moral ethics. It requires not just theoretical approach but practical engagement in the process of making a new shift. For Mckenzie and Scheurich (2004:609) enacting social justice takes on practical dimensions that need principals with skills to encourage their staff 'to get to know their students' and to facilitate dialogue with 'their students' families and community on a personal level' and to 'dignify the culture of their students'. All this is about respect for one another and being sensitive to issues of moral values. Justice and fairness is about being considerate of human dignity despite colour or race and gender. Mckenzie and Scheurich (2004) remind us that students and staff members appreciate diversity of cultures and beliefs through both study and direct experience and suggested that school principals can help children develop social skills and moral values through modelling, direct instruction and continual practice. In building upon Mckenzie and Scheurich's idea of facilitation, Shields, Larocque, and Oberg (2002) supported the notion that leaders need the skills to lead dialogue that engages staff about issues of race and ethnicity and for people to re-examine their own practices, perceptions and beliefs. Why social justice issues have become important in literature today is the genuine concern to improve educational environments which are not just culturally but racially diverse. Women as a resource have the potential talents for promoting leadership for social justice in schools. However, not much has been done globally to progress these talents as indicated by Blackmore (2009) in her observation of the Australian context.

The women school heads in this study (Enita and others not cited here) used creativity in their communication as they applied new ways of dealing with different challenges in their leadership. They enacted leadership that was more inclusive and accommodative of everyone without discriminating. The provision of sensitive and respectful treatment of both parents and the pupils showed the women's interpersonal principles of justice. While the study for this write-up cannot be generalised to every school, leader or society, there are lessons that can be learned which can help school leaders to improve their perceptions of their own school communities irrespective of the pupils class, cultural and ethnic backgrounds. The writer sought to highlight the uniqueness of the approaches enacted by women in an effort to combat the practices of injustices that reflected in their schools. The chapter demonstrated how leadership facilitated the creation of socially just educational environments within the discussed communities. Using literature, the author tried to demonstrate how and why, from a global context, a concern for social justice has risen. There is a need however to ensure that the school curriculum is gender sensitive and highlights women's achievements. Referring to issues of social justice at work and gender sensitivity, a need for adjusting the traditional hierarchies and drawing on flexible approaches inclusive of the school community is advocated.

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Chapter 42
Leadership, Educational Development, and Social Development

Joaquín Gairín and David Rodríguez-Gómez

Introduction

Education is a social construct permeated with values and one of the main instruments of socialization available to societies and power groups. Therefore, education has always been highly politicized. However, the development of clear and stable educational policies that contribute to substantial social improvements is still a major hurdle in the majority of democratic societies today. Unfortunately, education still reproduces inequalities (such as schools for the rich and poor, unequal access to the right to education, and insufficiently inclusive programs) and is not always a factor of social cohesion.

We should recall that the European Union set improvements in educational results and social cohesion as one of its priority objectives for 2010, two outcomes in which little headway has been made if we take into account some of the results from the latest international evaluations. Therefore, the goal is still to make inroads in strengthening the relationships between social and educational commitments, which would entail arduous efforts that combine constant progress in educational participation, equity, and quality (Santos Rego & Barca Lozano, 2009), factors which are directly related to social justice.

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Considering the multiple meanings of and approaches to the concept of social justice (i.e., Bogotch, 2000; Dantley & Tillman, 2006; Furman & Gruenewald, 2004; Soho, Merchant, & Lugg, 2005; Theoharis, 2007), and the fact that it is a construct that is highly dependent on the context in which it is used, in this chapter social justice will be considered directly linked to the processes of educational and social development inherent to each different context and in relation to the users of education.

Educational institutions, as organizations which play an active role in educational policies, are thus facing new social demands and requirements which involve transforming themselves as institutions for preparing students to participate more actively in increasingly diverse, complex, and dynamic communities. This change is necessary, yet it is only possible if the different educational contexts themselves change their traditional ways of acting in order to promote the development of educational leaders who are prepared to handle and respond satisfactorily to these challenges, thus generating "schools that advocate for education that advance the rights and education for all children" (Jean-Marie, Normore & Brooks, 2009, p. 2). As Tolosana and Muñoz (2010) suggest, educational centers "should be contexts of participation, management, and personal and collective realization" (p. 24).

Among other issues, as Bogotch (2000) notes, "the ongoing leadership challenge is to create social and political spaces for advocates, as well as outlaws, to function inside and out schools and deliberately to encourage activists and radical intellectuals to make explicit the connections to their subjective meaning of social justice" (p. 9).

School leaders, as the cornerstone for the improvement of disadvantaged schools, should have the expertise and specialized knowledge to face the challenges of education in the twenty-first century, combining a fair balance of quality and equity (OECD, 2012). The role of educational leaders should be reconsidered, taking as a reference the complex realities of school and the community which should collectively be developed to contribute to social development. In this regard, educational leadership beliefs should be revised to include perspectives of critical pedagogy (Freire, 1970), thereby strengthening their commitment to social justice by connecting their contributions to social development and promoting more democratic and inclusive social relations and institutions (Allen, 2006; Jean-Marie et al., 2009; McKenzie et al., 2008).

From this new vantage point, it makes sense to regard educational managers and leaders as agents of change, community leaders, and as promoters of social development through educational development. In contrast to a management model of maintenance, we propose management for transformation in which the values of equity, justice, commitment, and cooperation take priority over the traditional values of equality, efficiency, control, and competitiveness and all of this from the perspective that combines personal ethics with the social ethics and responsibility of the organization.

This chapter addresses issues linked to educational and social development, viewing educational organizations as an instrument to promote this development, community leadership, and ethics in organizations. The chapter will close with a description of an experience in educational and social development in the commune of Coyhaique (Chile), financed by the Spanish International Development Cooperation Agency (AECID), which involves 12 educational centers, a variety of programs (both school and social), and diverse collectives (i.e., vulnerable schoolchildren, maladapted youths, broken families). Its management is an example of cooperation and involvement in the region by several universities (both Spanish and Chilean) along with private and public institutions.

Educational Development and Social Development

Educational and training inequalities due to geographic or social origin or based on job, salary, or income opportunities are critical dimensions in social disaffiliation or exclusion, meant as the individual's inability to participate in the basic political, social, and economic functioning of the society in which he or she lives (Castel, 1995; Tsakloglou & Papadopoulos, 2002). According to OECD data (OECD, 2012), almost 20 % of students do not develop enough basic skills to function in today's society, and students of low socioeconomic status are more likely to be at risk of school failure. National education systems are not the only or the primary causes of social inequalities; however, they occupy a central place in developing compensatory actions that may contribute to lowering inequalities among youngsters of all classes and conditions.

The development of policies, including educational policies, which expand the access to opportunities, is fundamental in combating the permanent nature of exclusion and promoting democratic and healthy societies. As Ainscow (2008) reminds us, "to create a fairer society we must develop more equitable systems in the field of education that enable us to effectively handle the link between disadvantage, education, and opportunities" (p. 263). However, the development of fairer societies entails finding a balance between skepticism of the current role of educational institutions and the educational optimism which claims education – in and around educational institutions – as the cause of social equity (Tedesco, 2010).

There are studies that note the clear relationship between educational level, social development, and economic development (Bernard, Encinas-Martín, Rogers, Sato, & Valentini, 2009; Lind, 2008; Machin, 2006; OECD, 2006; Richmond, Robinson, & Sachs-Israel, 2008). Strengthening educational institutions, therefore, is an important factor in boosting the competitiveness of the social, economic, and productive structures and in fostering the development of a competent, committed citizenry. Today, one of the indicators of a community's commitment to social and economic development is a measure of how a society's tertiary educational systems are committed to research and development (R&D) indexes, the transfer and development with the productive sectors of society, and the processes of creating new scientific and technical knowledge.

Educational development can contribute to social development and can lower social inequalities and injustices if we first accept the belief that educational institutions today are partly responsible for the inequality of educational opportunities for whatever reasons (e.g., race, gender, culture, and socioeconomic level, among others) which perpetuate and accentuate social exclusion. Therefore, promoting educational development should enable people to establish a responsible, open, and critical relationship with their environment, which should enable them to make headway towards fairer societies.

Tedesco (2010) proposes five key strands which pose serious theoretical and political questions on their future of educational development. Based on these strands, strategic educational actions might enable us to move towards fairer societies:

(a) Early education: Early intervention, before inequalities are reproduced, is fundamental in breaking the vicious circle of social exclusion. Only through educational policies that place importance on early childhood education and developing strategies (i.e., educational, affective, health, and nutritional) that lower inequalities during the early years of life will greater levels of equity be achieved in adult life.

(b) Educators and pedagogical knowledge: Today, no one doubts that the quality of education rests largely on the quality of the educators (i.e., the existence of a suitable plan, a clear orientation towards teaching, commitment and responsibility with the results, teamwork, and the institutional climate). However, we are living in a time when the teaching profession is losing prestige, and there is a surge in low motivation and mistrust in the learning potential of the teachers themselves. This situation reveals the need to revise the effectiveness and relevancy of pedagogical knowledge, to develop collective teaching professionalism, to improve working conditions, and to provide professional development plans according to the individuals and contexts in which educators work.

(c) Scientific literacy and citizen training: Two of the cornerstones of fair, high-quality education are "learning how to learn" and "learning how to live together" (Delors, 1996). Scientific literacy is a necessary, though not sufficient, condition for the development of a critical, reflexive citizenry and a concomitant drop in the social fragmentation derived from this "cognitive divide." This scientific and citizen training can be achieved through both formal and informal education.

(d) Digital literacy: The rising presence of the information and communication technologies (ICTs) in recent years offers a new source of exclusion and inequality, digital ones (DiMaggio, Hargittai, Celeste, & Shafer, 2004; Warschauer, 2003). Digital inequalities stem initially first from access to these technologies and secondly from the motivation, capacity, and effective use made of them. Even though educational centers can contribute significantly to lowering these digital inequalities, recent studies show that schools play a secondary role in the development of digital competences (Meneses & Momino, 2010). If so, we must think about effective processes of including ICTs in the day-to-day business of schooling so that they can have the desired effects on better school performance.

(e) Subjectivity policies: The four elements or strands of intervention listed above are crucial in efforts to lower social inequalities, but they are not enough in

> themselves. We must also more strongly affect the subjective determinant that reproduces social inequalities and explains individuals' limitations in generating and achieving their aspirations. "The contexts and frameworks of references in which households operate influence both individuals' aspirations to achieve different functions and their perceptions regarding the possibilities of achieving the goals they set" (UNDP, 2010, p. 81). Therefore, it is not enough to solely work on the material results of learning as a way of promoting fairer societies; rather we must also influence the subjective dimension of the main stakeholders in the teaching-learning process.

How do we achieve the factors above which are linked directly to educational processes which influence educational and social development of any country? To do so requires that we talk about both educational exclusion and social exclusion. Fortunately, educational and social exclusions are neither natural nor episodic; rather they are processes that are developed and constructed in socio-educational contexts in which school, personal, and social factors converge, and we can act on these factors to attenuate and/or combat these exclusions.

We can now say that the development of high-quality education for everyone is the sine qua non condition for lowering school failure rates and achieving a just society. However, in recent years, because of decontextualized educational policies, practices have been developed based on the erroneous equation of educational quality and equity with earning the best results on a variety of exams and tests (such as PISA tests). These practices have had a variety of results which often penalize the schools and students who are situated in and start from more disadvantaged positions. This results in boosting the dissatisfaction with the processes and results of education and neutralizing the democratizing effect of the expansion of school coverage (Ainscow, 2008; Tedesco, 2010).

We also recognize the efforts being made in Latin American countries [and Spain] to spread basic and middle-level instruction (OEI, 2010); however, these initiatives aimed at developing "quantitative" policies (e.g., education for as many citizens as possible) must be complemented with "qualitative" policies of positive anti-discrimination and support for the social collectives whose economic, geographic, ethnic, or cultural vulnerability leads them to experience more problems.

However, affecting social and community development, and promoting equity and social justice based on educational processes, is extremely complicated if it does not come hand in hand with the involvement and commitment of the local, political, civic, and economic authorities of the sphere of action. Overarching policies are needed which include social commitments, but at the same time, they must be aligned with ethical practices among the authorities, territories, and educational centers.

In Spain, one clear example of the common effort among the different educational agents, authorities, and regions to lower social injustice is the "movement for quality education in Madrid" since the mid-1990s. This movement is aimed at combating the process of social deterioration and marginalization in the southwest sections of this city which has experienced deindustrialization in the 1980s, the proliferation of drug addiction since the early 1990s, and the settlements of marginal shanty town dwellers

(Casas, 2008). This movement, which is essentially made up of teachers, families, unions, and neighborhood and cultural associations and which has close ties to the social and educational worlds, "managed to exert a significant influence among public opinion, the authorities, and the school and social community in the zone" (Casas, p. 211). Its objectives were:

1. To demand the legal, budgetary, and organizational measures that would enable them to offset the sociocultural deficits of the affected population
2. To promote the involvement and coordination of all administrations in the task of education
3. To spearhead coordination among schools, especially primary and secondary schools
4. To draw up and disseminate new theoretical and practical perspectives on the subject of the movement
5. To encourage other entities and associations to develop educational practices (education open to the environment)

Another example of educational actions that aims to contribute to social justice has been the "local educational plans" promoted by the Department of Education of the Generalitat de Catalunya. This is an open educational cooperation initiative which aims to offer comprehensive, community responses to the educational needs of children and adolescents by coordinating and promoting educational action in the region outside the schools (Generalitat de Catalunya, 2011). As a strategy for social transformation, the local educational plans strive to:

- Contribute to the goal of finding a balance between competitiveness, individual effort, and the struggle against inequalities which emerged from the conference[1] that the European Council held in Lisbon on the 23rd and 24th of March 2000 to reach a new strategic objective for the European Union aimed at strengthening employment, economic reform, and social cohesion as part of a knowledge-based economy.
- Handle the steady rise in immigrants and the new demands being placed on educational centers, which are recommended joint, complementary educational actions among families, schools, and all the local educational stakeholders.

The two major objectives of the local educational plans are thus related to the following: (1) achieving educational success for all students in their personal, social, academic, and job-related dimensions, so that they develop a rich and balanced personal identity, acquire the competences they need to rise to the challenges of daily life, and develop the social skills and right attitudes to live peacefully in today's society and (2) promoting social cohesion through intercultural education, equality, and fostering the use of Catalan to contribute to creating a common space of values shared by the entire citizenry which fosters peaceful coexistence through the respect for diversity.

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[1] http://www.europarl.europa.eu/summits/lis1_es.htm

Other examples of synergies between educational programs and social community development can be found in the *favelas* of Sao Paolo, Brazil, and the educational and social services in marginalized neighborhoods like Barcelona's El Raval, the professional initiation activities being disseminated in several Latin American countries (Peru, Bolivia, Nicaragua, etc.) by civic associations. All of them aim to promote social inclusion through education.

Educational Leadership, Commitment, and Social Justice

Even though it is true that studies reveal that teachers (their beliefs, attitudes, and actions) are crucial to the effective development of inclusive practices that contribute to social justice, they are not the only factor to take into account. Inclusive practices also rely on the influence of educational policies, either state or municipal, as well as the forms and styles in which schools are managed and operated (Ainscow, 2008).

Just like other authors (Pont, Nusche, & Moorman, 2009), we are referring to school leadership in the broadest sense, which includes school managers and other external and internal agents who affect school administration and operations, in short all the agents (principal, head of curriculum, heads of educational departments, etc.) devoted to coordinating the work of other professionals. Recognition of the importance of school leaders in the progress of educational centers is unquestionable. The rising complexity of educational organizations and particularly the gradual increase in the levels of autonomy and responsibility are leading to greater difficulties in the managerial functions (i.e., planning, delegating jobs, coordinating, executing, and monitoring). They also require a revamping of the concept of school management to adapt to the contextual needs and demands by promoting the development of leaders who are grounded and contribute to creating solid social and organizational knowledge through their day-to-day experiences.

There is a clear tendency, which is even further accentuated in some English-speaking countries (but not the USA) to provide greater autonomy to schools, turning them into key agents of change in improving the quality of the educational system and in boosting students' performance and social cohesion and lowering dropout rates.

This greater autonomy (pedagogically, organizational, managerial, and in relation to the surroundings) and the reconsideration of schools as network nodes where social, political, and cultural change can be promoted entail a reconsideration of the role of the leaders at public educational centers. Their competences and responsibilities expand, and they take on necessary functions for the proper exercise of institutional autonomy: participating in determining the staff, in selecting part of this teaching staff, and in determining the internal organizational structure, among others. Within this framework, both educational leaders and educational researchers should remind society of the essential role played by schools in promoting democracy and insist on their role as intellectual activists which contribute to strengthening this democracy (Kochan & Reed, 2005a). These new assumptions are aligned with some of the characteristics that school leadership should have if it aims to effectively contribute to social justice as transformative, technically and morally balanced (Dantley & Tillman, 2006), distributed (Pont et al., 2009), collaborative, and communitarian (Kochan & Reed, 2005b).

> Inclusive administrative practice is rooted in values of equity and social justice; it requires administrators to bring their full subjectivities to bear on their practice, and it implicates language as a key mechanism for both oppression and transformation. (Riehl, 2000, p. 55)

Moving towards more inclusive and committed systems and schools which face a higher degree of uncertainty also requires the development of competences to manage and promote change based on constructive, interactive educational leadership which is shared with the educational community, which jointly constructs meanings, and which shares a common educational purpose.

Thus, the concept of school leadership must be extended to encourage and foster distributed leadership through the creation of new structures and ad hoc teams without neglecting the need to strengthen the existing structures and bodies (such as the school board or head of curriculum), which give greater guarantees of successfully rising to the challenges facing schools (Lambert et al., 1995; Pont et al., 2009). Additionally, some studies (Mulford, Silins & Leithwood, 2006) have found relationships between distributed and transformative leadership, which enable the other members of the school community to participate and foster the organizational learning processes within schools. This is, we believe, a new profile for educational leaders with competencies and capacities to promote the development of an inclusive educational culture and effective instructional/curricular practices through greater ties between the school and its environment and through the professional development of its teaching staff (Hasazi & Shepherd, 2009; Huber, 2004; Pont et al., 2009; Riehl, 2000).

The distributed leadership to which we are referring is directly linked to what we could call a communitarian leadership profile which is charged with connecting and adapting the educational centers to their surroundings and to reinforcing their relations and ties with other educational and social agents and entities in their immediate environs. Their job is to open the school up to its environs and bring it into a local network that generates processes of knowledge management and collective learning and which shares resources and consequently facilitates the development and adaptation to this changing context to which we have referred to above (Gairín et al., 2011; Hargreaves, Halász, & Pont, 2008; Kochan & Reed, 2005b). However, promoting this profile of educational leadership and collaborative institutional culture open to its environs will not be an easy job when the vertical structures and individualism in school, reinforced by a poorly understood autonomy, are so accentuated and complexly resistant to change.

Several studies (i.e., Jean-Marie et al., 2009; Marshall & Oliva, 2006) note that oftentimes the subject-matter content linked to equity, democracy, and social justice is neglected or marginalized in the preparation programs of educational leadership, making it difficult for aspiring leaders to get an in-depth understanding of the issues and consequently for them to act effectively on behalf of social justice. Jean-Marie et al. suggest that the uses of the dialogic framework derived from critical pedagogy can help educational leaders to develop a profile more attuned to fostering social justice and handling the changing social conditions. Preparation programs for school managers and leaders must therefore offer spaces of "critical reflection, leadership praxis, critical discourse, and develop critical pedagogy related to issues of ethics, inclusion, democratic schooling, and social justice" (Jean-Marie et al., p. 20). The pedagogical activities of leaders under this perspective should combine the aforementioned contents with the development of positive sensibilities and attitudes towards communitarian work and action to combat inequalities and processes of marginalization.

Ethics and Social Justice in Organizations

Educational centers, as social institutions, must necessarily contribute to the social and community development of their immediate context by getting actively involved in lowering social differences (Jean-Marie et al., 2009; Tedesco, 2010) and accepting the social commitment that behooves them. Even though the instrumental conception of educational organizations is still valuable, "their role in promoting internal change and driving social transformation is increasingly emphasized" (Gairín & San Fabián, 2005, p. 181).

Educational institutions can contribute to making headway in democracy in society, or, to the contrary, they can perpetuate and foster the existing inequalities (Apple & Bean, 1997); their actions are not neutral and are framed around specific values that are either explicitly or implicitly ever-present. Hence, there is the need to stress the ethical nature of educational institutions, especially when viewed from Levinás' perspective based on the idea of otherness. Educational centers as organizations must side with the "other" and understand that it is through this "other" that they are what they are. "From the moment that the other looks at me, I am responsible for him without even having to take responsibilities in relation to him; his responsibility is incumbent upon me. It is a responsibility that goes beyond what I do" (Lévinas, 2000, p. 80).

This perspective pushes us to shift from personal ethics to organizational ethics. In other words, the view of managers as agents of change who act on persons cannot be separated from ethical considerations, nor should we separate organizational actions from the effects that they have on the people who interact with them. Ethics should not only encompass individuals' actions but also organizational action and even the organization's commitment to universal problems (Gairín, 2004). It should also refer to both real and virtual situations to avoid falling into relativism according to the means of communication. We thus fall within Edgar Morin's perspective, who speaks about the ethics of the human being as one of the kinds of knowledge needed for the education of the future. For this reason, he posits an approach that takes into account both the individual and the society and even the species. This entails envisioning humanity as a planetary community composed of individuals who live in democracies.

> I talk about self-ethics, socio-ethics, anthro-ethicsm and planetary ethics. And I do so because I see the individual, society, and the human species as interdependent categories. Above all, contemporary complexity makes it impossible to discard any of these perspectives. Today's problem with ethics is not duty, prescription, rules. We do not need categorical imperatives. We need to know whether the result of our actions corresponds to what we want for ourselves, for our society, and for the planet. We know that having good intentions is not enough, given that innumerable disastrous actions have been taken with good intentions. My ethics is an ethics of the goodness of thinking, and my entire idea of complex thinking is implicit in it. (Morin, 2004, p. 56)

Based on *individual consideration*, García and Dolan (1997) posited a different perspective in relation to management, linking it to values and introducing references to ethics and morality. In their view, true leadership includes a dialogue with values, which entails such things as a greater person orientation, help to achieve the strategic vision, and the inclusion of ethical and ecological principles. The consideration of ethical dimensions in leadership, even though they are implicit in many training and intervention processes, has not always been dealt with explicitly and treated as such. One example is the work by Pelletier (2003) focusing on the development of educational leaders. While his work presents many ideas for action and innovation in leaders (e.g., forging alliances, showing confidence, openness), it does not explicitly mention ethical behavior. Managers' actions are not neutral and usually have a range of consequences. What managers do affects the community, and they are therefore ethical acts because they generate favorable or unfavorable consequences for everyone and affect the institutional harmony.

There are diverse models of ethics, although the ones recognized by Nava (2003) are significant for their clarity as they identify typical managerial behaviors. A summary of his proposals is contained in Gairín (2004).

(a) The management model based on the ethics of exclusion, which can be identified by factors such as the following:

  - The ethical nature of decision-making. This is focused on the manager's sole criterion and as a demonstration of his power, authority, and self-complacency regarding his greater knowledge or ability. This entails the impossibility of accepting other approaches and denies others' freedom as it relegates them to oblivion.
  - The formation of groups in favor of the school's responsibility. The managers' work with unconditional lowers the chance of opportunities, fosters the existence of a narcissistic ethics, and boosts the difference between management and the moral and professional growth of the members of the organization. Here we can identify an instrumental ethics, since it seeks the simplest ways of achieving the organization's purposes; however, its application denies others' participation and the quest for the best working proposals.
  - The kind of communicative rationality. Here we are referring to the language of imposition which does away with other forms of manifestation, becoming a totalitarian language because it only has the formula of power and all its proposals are translated into domination. By denying educators as people with opinions and a language of their own, it is impossible to learn about the

diversity of opinions existing in schools, and words are often not found to address others.

(b) A management model based on a shared ethics, which is characterized by three factors:

- The nature of decision-making. Viewing management as a constant dialogue with the agents involved entails recognizing them as people, fostering shared purposes, and helping to eliminate entrenched perspectives that are not always coherent with collective commitments. It means recognizing a space for justice where the members' actions are not arbitrary but subjected to rules of cooperation and a climate of mutual respect.
- The manager's experience as a moral underpinning of management. The managers' experiences as teachers are fundamental in sharing the teaching and management approaches, thus effectively linking the teachers' needs with the institution's needs.
- The managers' actions as virtues when decisions are taken according to what one is morally obligated to do. This is only possible if the ways of operating reflect certain values.

The considerations above highlight the fact that managers are obligated to provide certain conditions of treatment and respect for the members of the educational community. This entails accepting the teachers and other organizational members as capable of proposing projects and creating conditions for change.

> Thinking about management as an ethical accompaniment means taking into account others' intentions, expectations, desires, and opinions; that is, the teacher's subjectivity should be borne in mind. The intentionality towards the other is the opposite of an individualistic management model. (Nava, 2003, p. 71)

Therefore, ethics should be a constant referent in managers' actions which can integrate ethical values into the entire set of values making up the culture of a center, or alternatively, ethics is the crosscutting referent of the other values and beliefs that make up the ethical universe of the institution.

Based on the *organizational consideration*, organizations are viewed as social spaces which are not only carriers of values but can also act in shaping new values and ways of acting that confer meaning on what had been done before. We are talking about the organization as a true ethical space where values like justice, reciprocity, cooperation, and creativity are manifested. Ethical commitment entails, among other things, a political commitment, effective codes of conduct, transparency in actions, and commitment to the stated values. We should also view that ethics in organizations is a dimension of the broader concept of civic ethics.

However, we tend to forget that educational intervention has a moral and ethical grounding and that a good education itself contains many ethical principles of action. When we say that the school should be autonomous and autochthonous, open and committed, updated and critical, participative and democratic, a school for opportunities that places the strengthening of leadership, the professional development of its teaching staff, the implementation of the information and communication technologies, and constant improvement as crosscutting policies (Gairín, 2003), this is precisely and literally what we mean.

Underlying the entire proposal is the idea of promoting an ethical, high-quality school for all citizens. This includes ongoing efforts to create a school that is (1) democratic in its objectives, processes, and purposes, (2) self-critical, (3) understanding, (4) not elitist, (5) inclusive, (6) integrative and equitable, (7) attentive to diversity and pluralities, (8) nondoctrinaire, (9) competent but not competitive, (10) open to dialogue and participative, and (11) committed to its surroundings and to social improvement, as befits a progressive view of education.

Thus, intervention includes and entails *ethical behavior* by organizations. The future depends not only on the evolution of the productive systems or the vitality of the values and citizen actions that direct and feed them but also the development reached by organizations as the context and text where people interact. Here is where education takes on meaning as a collective conscious, intentional project, as an expression of the utopia we want to achieve, and as the methodology for achieving it.

Organizational realities and processes express values and priorities. Free access to spaces is not the same as controlled entry or the existence of spaces that are restricted to certain actors; promoting diversity is not the same as uniformity; making action possible is not the same as constraining it. The organization is projected into what it is and what it does; we know this and confirm it through these examples. However, perhaps we should give it yet "another turn of the screw": organizations should analyze the reasons behind their actions and whether their actions and their results reflect or respond to the values they wish to project, that is, whether their actions are ethical or not, whether they generate positivity or not. The point is not that organizations do not educate or that they do not act with logical, legal purposes. The goal is to act from a positive human standpoint, reviewing what organizations do and what their forms of action entails.

In this regard, we have to consider the sense of using punishment or humiliation to achieve certain lessons; the use of selection, marginalization, or expulsion systems on certain users; the lack of proper security and hygiene in some facilities; the outsourcing of staff for conducting certain activities; the (usually economic) reasons why some real social problems are concealed; the use of economic reasons as the only reason to justify actions; the dogmatic and non-debatable beliefs on operation; the impunity of power; and the meanings of the official history.

Even organizations which are supposed to provide services to the community, but from an ethical perspective, their performance and conditions are destructive to their members. For example, how do we account for run-down senior citizen centers, companies that encourage NGOs while they destroy the environment, and institutions that combine exclusive services and services for the socially marginalized? We cannot ignore effects and conditions of social realities (Gairín, 2004). As such, we must reject any organizations that neither measure nor consider the effects of their decisions on people and society .We must criticize organizations that damage their members and the community even when they are providing required services. In such instances, the effects are often attributed to pragmatism, amoral leadership, and the transgression of ethical principles. The ethics of these approaches includes a commitment to improvement, and in this it is related to social justice. Thus, the goal is to uncover perversities not just to condemn but in order to act. Acting against these perversities is a process of reordering, of rethinking as a whole, of rebuilding the pathway as realities take shape, and of striving to generate more positive results. It is the idea of rethinking the culture and the perspective of viewing change as a cultural feature. The referents in all these cases are the values linked to human dignity, freedom, autonomy, equity, and equality.

We believe that getting back the ethical sense of organizations or ensuring that rules on content prevail is therefore fundamental when outlining and developing institutional guidelines. This insistence on the "why's" of what we do also entails a return to the human dimension of organizations and with it a consideration of people (with their feelings, attitudes, interests, and perversions) as an active, direct part of their success, including both external concerns (working conditions, effects on the social reality) and internal processes (people as a whole).

Therefore, we are calling for a new way of acting and managing educational institutions which not only emphasizes technical improvements in processes but also entails a concern with the underlying values and applied ethics.

Educational and Social Development in the Town of Coyhaique in Chile: An Experience to Share

The purposes of this project are first to validate a socio-educational development model for medium-sized Chilean municipalities and secondly the desire of the University of Talca (through its Institute of Education) to become an agent that promotes change and social transformation through social, technological, and human transfer strategies in the region.

The "Project on Support and Educational Strengthening in Management and Professional Teaching Competences" carried out in the commune of Coyhaique in southern Chile is a proposal promoted by several institutions (the University of Talca, the Training Foundation [FIDECAP], which depends on the Federation of Private Educational Institutions [FIDE], and CEIS Maristas) was coordinated by the Organizational Development Team (EDO, http://edo.uab.cat) at the Autonomous University of Barcelona and is funded by the Spanish International Development Cooperation Agency (AECID).

The reasons for choosing Coyhaique as the town to perform the activities that serve as a practice field for developing the model are linked to the region's situation of geographic, economic, and political marginalization and even more importantly to the fact that its academic results are among the lowest in the country. Likewise, Coyhaique is a region suffering from serious problems linked to social collapse and marginalization among a broad range of its population.

Regarding education, the commune or town of Coyhaique offers several levels of pre-basic, general basic, and middle education in the fields of science, the humanities, and professional technology at 16 educational centers, half of which are located in rural areas. Likewise, it has a special education school and a comprehensive adult training center, all of which depend on the town's education service. All told, the educational institutions in the region serve 5,000 students. These institutions, in turn, according to the figures from outside testing conducted nationally through SIMCE (educational quality measurement system) are the ones with the poorest academic results.

The town's educational leaders themselves identify three factors that somehow define the precarious status of the schools in the commune. The first is the shortage of resources due to the fact that the school's funding is insufficient and unstable. Likewise, they also spotlight families' lack of concern with their children's education, which burdens the educational institutions with greater responsibility. Finally, they note the low level of generational renewal in the schools, which is due to the low pensions paid to the teachers, rendering it impossible to hire new professionals with up-to-date ideas and knowledge.

Given this context, the project aims to improve the capacity in the educational centers of Coyhaique by promoting changes that make it possible to improve their educational capacity and indirectly improve social development through better qualified human resources and greater societal involvement of its promoters in an effort to avoid excluding the more disadvantaged classes. The goal is to leave the personal and institutional capacity that already exists and to strengthen the educational centers in the areas that we believe exert the most influence on school performance (leadership and curricular development in instrumental subjects). In concert, another goal is to boost the school's importance in the family and sociocultural setting by supporting parallel projects like the ones linked to youth, promoting parents' schools, spearheading community educational projects, and combating absenteeism.

The ultimate goal of the project is to construct and reinforce a network of cooperation and support among the educational centers dependent upon the commune of Coyhaique (Chile) in order to promote educational improvement and with it the social and cultural development of the region. The basic premises upon which the project is grounded are associated with the relationship that we believe exists between educational development and social and economic development, especially if we relate the spaces of poverty with educational variables (attrition, literacy levels, quality of learning, etc.).[2] Also, from our abovementioned ethical and leadership for social justice approach, the project enhanced distributed leadership profiles that support, evaluate, and develop teacher quality, as well as encouraging social commitment (i.e., better education investment) and a strong relationship between all stakeholders in schools (i.e., school-family-community partnerships).

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[2] Reflections, actions, and proposals related to the project can be seen in the texts by Gairín and Castro (2010) and Gairín and Sánchez (2011), which also outline the subprojects performed and the personnel involved.

The overall objectives of the proposal refer to support for the municipal educational centers in the commune of Coyhaique in their management processes and the development of the language/communication and mathematics educational programs. They are outlined in specific objectives every year (see Table 42.1).

Activities Performed at School

The project is working on four major strands which take shape through six activity packages that were designed in the first year and have been implemented in the ensuing years in order to achieve the annual operative objectives (see Fig. 42.1). In essence, we can note that there is complementariness between the activities implemented in-person and the activities performed virtually, so the project remains active all year long despite the fact that its members are not always in the site where it is being implemented.

Training Activities

Training activities were held targeted at two specific groups: first, the managers of the educational centers in the town and, second, the language and mathematics teachers. These activities were based on a training plan which was drawn up in the first year of the program after an assessment of the needs in the region. The purpose of this initial diagnostic was to determine the current situation in the region, to compare it with the desired situation as expressed by the recipients and the educational authorities and regulations, and based on that to plan the training programs.

The training targeted at the language and mathematics teachers was managed by the University of Talca under the supervision of the Autonomous University of Barcelona, while the training for the management teams was coordinated and delivered by the UAB professors associated with the project. The 4-year training plan for managers was fleshed out into key subjects in effective managerial action, as shown in Table 42.2.

These in-person training activities include explanations by the staff of the universities involved, which are then complemented with debates, related activities, exercises, and proposals for projects at the institutions. What is more, the training activities are complemented with online knowledge creation and management activities which enable the managers to stay in touch with the trainers, in addition to facilitating the exchange of experiences and points of view among the different educational institutions in the commune. Likewise, it should be borne in mind that the knowledge creation and management networks generated have enabled subjects of interest to the institutions to be examined (such as the institutional image), which have helped to demonstrate the tacit knowledge of the experiences being conducted

Table 42.1 Outline of operative objectives for the period 2008–2011

Objectives 2008	
To delimit the needs for change in the schools To design and launch the management training program To delimit the training needs in language and mathematics teachers and to draw up a training program To develop virtual spaces for knowledge creation and management (KCM)	To support the educational centers in their management processes To create a consulting program for the staff of the educational centers To outline the proposal for follow-up and evaluation of the progress, results, and impact
Objectives 2009	
To develop the annual management training program To start the first phase in the training for language and mathematics teachers To strengthen the network of KCM managers with two new subjects To create and develop KCM networks of language and mathematics teachers To advise the schools involved in the innovation programs	To work with the teaching and research teams at the University of Talca to enhance their ability to transfer knowledge to their environs To maintain and develop the project's website and virtual campus with new contents and activities To evaluate the impact of the training and other kinds of programs developed To disseminate the project to other towns and in the socio-educational context
Objectives 2010	
To design and develop the annual training program for teachers and managers To institutionalize strategies to develop and constantly improve the institutions To strengthen the network of KCM teachers and managers with new subjects To encourage specific consulting with the managers and teachers involved in the innovation projects	To evaluate the impact of the training and other kinds of programs developed To maintain and develop the project's website and virtual campus with new contents and activities To disseminate the project among public organizations and agents To encourage the exchange of students and teachers from the institutions involved
Objectives 2011	
To design and develop the annual training program for teachers and managers according to the 4-year plan approved To institutionalize the improvement plans developed to date To set up a network to support the managers' professional activities To manage spaces for knowledge creation and management To maintain and develop the project's website and virtual campus with new contents and activities	To celebrate the second regional gathering and the first national gathering on educating towns To get the agents participation in national training actions involved to complement the perspectives offered in this project To evaluate the impact of the training and other kinds of programs developed in the schools To disseminate the project among public organizations and agents To encourage the exchange of students and teachers from the institutions involved

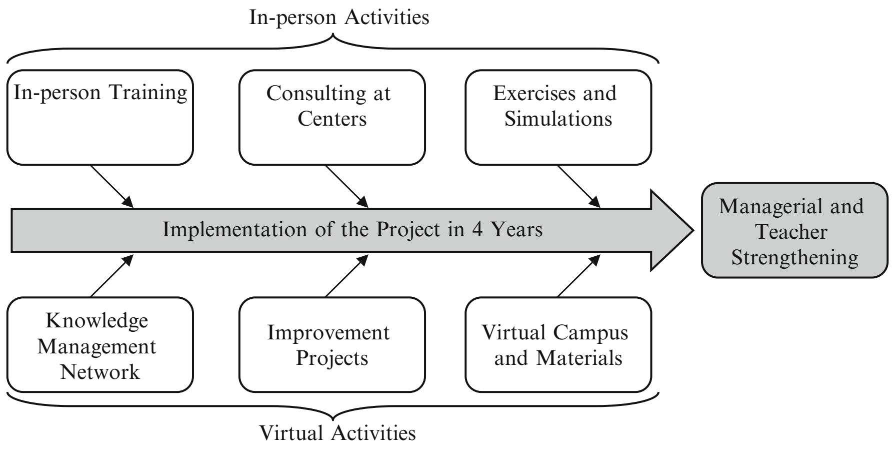
In-person Activities
In-person Training
Consulting at Centers
Exercises and Simulations
Implementation of the Project in 4 Years
Managerial and Teacher Strengthening
Knowledge Management Network
Improvement Projects
Virtual Campus and Materials
Virtual Activities

Fig. 42.1 Basic scheme of the project's development

Table 42.2 Table summarizing the training contents for managers

	Year 1	Year 2	Year 3	Year 4
Educational planning	Institutional guidelines	Management of resources	Innovation and change in educational institutions	The new educational needs resulting from social dynamics and school changes will enable the last of the contents of the fourth year modules to be designed
Curricular management	Planning the school's curricular project	Instruments to monitor and evaluate the school's curricular project	Innovation in the school's curricular project	
System of relations	Relations with families	Coordination of teaching teams	Local plans	
Managerial function	Managerial action	Making the structures more dynamic	Institutional evaluation	

by the educational institutions while also contributing to the participants' learning, either through interaction with other colleagues, through materials, or through the reflections shared on the virtual network created.

It should be noted that the UAB's virtual campus and the ACCELERA model (http://accelera.uab.cat/) developed previously by the EDO team were used to develop the knowledge creation and management networks.

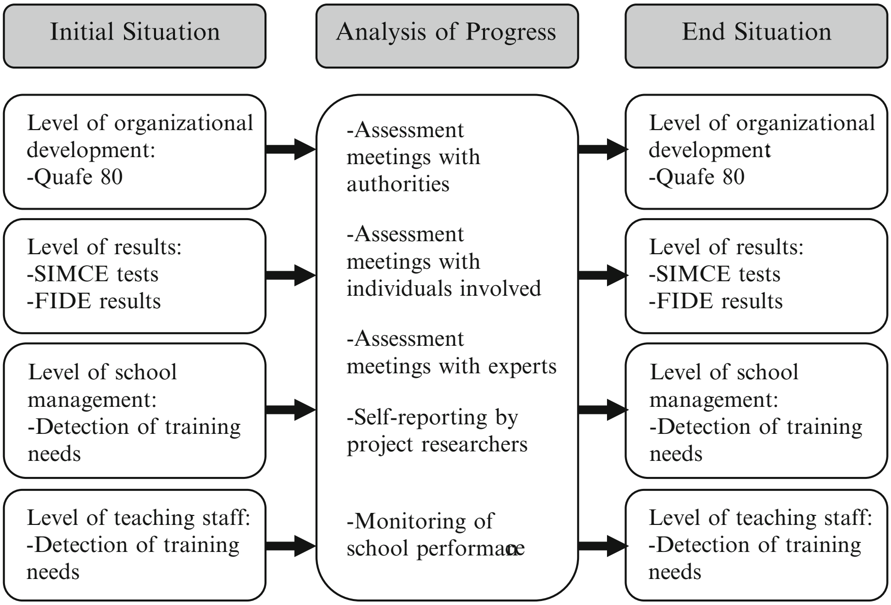
Initial Situation
Analysis of Progress
End Situation
Level of organizational development:
-Quafe 80
Level of results:
-SIMCE tests
-FIDE results
Level of school management:
-Detection of training needs
Level of teaching staff:
-Detection of training needs
-Assessment meetings with authorities
-Assessment meetings with individuals involved
-Assessment meetings with experts
-Self-reporting by project researchers
-Monitoring of school performance
Level of organizational development
-Quafe 80
Level of results:
-SIMCE tests
-FIDE results
Level of school management:
-Detection of training needs
Level of teaching staff:
-Detection of training needs

Fig. 42.2 Basic scheme followed in the educational development of the schools in Coyhaique

Consulting at Schools

One of the activities performed as part of the project was to outline the innovation and development projects at the schools and in relation to their environments. The members of the project team travelled to the town of Coyhaique (usually in three periods per year) and have visited the centers to provide advice and support in implementing the different proposals for improvement. Figure 42.2 describes the process/development model designed based on a prior analysis of the schools' needs taking into consideration the progress that they have made and their end situation.

As can be seen, the initial phase of the project entailed gathering information on the level of organizational development at the schools using the Quafe 80 questionnaire, and the academic results of the students were analyzed based on the results of SIMCE tests and the tests performed by FIDE. Likewise, the training needs of the teaching staff and managers were also taken into account.

The results of the analysis helped to define the specific training topics and design the innovations to be spearheaded and performed at the different sites:

- Curricular development and optimization of times at Río Blanco school.
- Encouraging reading and the use of the school library at Valle de la Luna rural school.
- Educational innovation project: sharing education with my children at República Argentina school.

- Development of psycholinguistic skills in reading comprehension and speed at Nieves del Sur school.
- Coordination of teachers tending to special education needs at Víctor Domingo Silva municipal school.
- Outline and use of curricular materials at Josefina Aguirre lyceum.
- Reading plan and its implementation at Pedro Quintana school.
- Mentoring teachers in the classroom at Baquedano school.
- Lowering school absenteeism: a network experience at the Integrated Adult Education Center.
- Implementing the project to improve the social climate at España special education school.
- Reading at our school, a challenge for better teaching at Pablo Neruda school.
- Reading plan and improving reading comprehension: together we will build the future at Valle Simpson school.

The implementation of these projects led to noticeable improvements in the educational institutions; however, we also detected several problems in this implementation which are related to the lack of resources available to the centers, the low degree of involvement by the teaching staff, and in some cases the difficulties of securing the support of external advisors during the periods in which the university advisors were not there.

Exercises and Simulations

Part of the implementation of the training and consulting activities also consisted of designing exercises and simulations which helped both the managers and the teachers to provide coherent, professional responses to the activities and problems that arise in day-to-day management and the new demands in and approaches to language and math teaching.

A variety of teaching guides were also developed to help the participants in the training to prepare for the sessions and to be used as reference. Several Moodle classrooms were also set up linked to the Autonomous University of Barcelona's Virtual Campus, through which the doubts and questions sent in by the participants in the training actions could be tracked.

Overall Assessment of the Educational Project

Now that the project has been completed, we can assess its results at different levels: objectives, activities conducted, execution, and follow-up mechanisms and results. Only the assessments of the school activities are included since other programs and local authorities handle the extracurricular programs.

Regarding the Objectives

Support for the managerial processes at the municipal educational centers in the commune of Coyhaique is a reality today, and we can state that the objectives were successfully transmitted.

The processes of strengthening the teaching staff in the processes of teaching language and communication and mathematics took place according to the prearranged sequences and reached the quality benchmarks set. However, the influence of the calendar of work stoppages and strikes by public school teachers shifted some of the activities within their planned time frames; they also affected the in-person sessions with the trainers that were heavily focused on theoretical aspects, and few applied activities linked to problems in professional practice were held.

Promoting processes of change in educational centers that depend on the town by installing and developing networks for knowledge creation and management in the chosen areas has been effectively institutionalized. We can say that the culture of innovation has been adopted at the level of managers, and this cultural shift is underway at the level of teachers.

Regarding the Activities Performed

All the planned activities were performed with high rates of satisfaction (diagnosis, analysis, training, consulting, dissemination, platforms, networks, etc.), and they were effective in achieving the stated objectives of the activities. Likewise, we can say that they were also effective in their execution and design, except in the case of the specific teaching areas where we initially detected certain deficits in the teaching and the thematic content, which were later offset.

Regarding the Execution and Monitoring Mechanism

The coordination and monitoring mechanisms set up proved to be highly effective. The internal coordination of each team was managed by the heads of each university center. Their goal was to carry out the actions called for in the initial design, to execute the diagnoses, training, and consulting, and finally to supervise the headway made as the work progressed.

Intergroup coordination mechanisms were also set up via in-person meetings in the target country, the operative coordination of the two team coordinators (in Spain and Chile), and the exchange of management documents regarding day-to-day operations among the institutions involved.

Regarding the Results

The establishment of this project has effectively fostered the relationship between the consolidated EDO working and research team at the UAB and the researchers from the University of Talca and the other participating organizations. This network of cooperation has generated a model of exchange, reflection, and mutual support whose synergies foster training, consulting, and constant improvement. In parallel, there are signs that it is possible to devise overall local educational plans and that this formulation not only facilitates educational development but also supports dynamics of social change.

Evaluation processes of the actions have been institutionalized through quality systems with the application of PISA or similar tests, and their monitoring demonstrates improvement in school performance. Therefore, the improvements have come not only in the potential academic performance but also in the related diagnostic and implementation processes.

Conclusions

We do not and should not conceive of any educational intervention except in relation to the social context. This two-way relationship between educational development and social development is nothing other than a cooperative relationship, and just like all cooperative relationships, it must be based on mutual respect for the different situations that may arise. In this regard, we should recall the five cornerstones upholding "genuine" socially conscious cooperation, in the words of the Dutch aid worker Hernán Vandevelde (Gairín & Castro, 2010), which may be adapted to institutional work with the community.

1. The *art* of listening: OPENNESS. Knowing how to listen and doing so while showing a profound respect for the other person. The goal is to listen and be heard, respecting diversity and considering the relationship as an opportunity to jointly construct new pathways and perspectives.
2. The ability to interpret: READING. The goal is to know how to critically interpret the shared context in both the town and the community, on the micro- and macro-levels. This entails eliminating the imposition of one's own predetermined criteria thanks to the aforementioned openness.
3. The *desire* to share: TENDERNESS. This refers to tenderness or what can be simplified by being united actively and affectively in the pathway to be taken or when jointly grappling with problems.
4. The *decision* to commit: POSTURE. The goal is to take a stance or choose "a side" where we want to be. True cooperation must translate into a radical option for the exploited classes, the impoverished classes, and the excluded classes. Genuine cooperation does not mean acting freely; rather it implies a well-defined and contextualized preferential mindful choice.

5. The *vision* of integration: STRUCTURE. All genuine cooperation implies a great deal of effort in terms of organization and coordination, of working in and with networks. It includes a human structure that will make the cooperation sustained. The goal is thus to shift from processes of aid or providing aid, no matter how important they may be, to processes of cooperation in which the one-way movement of aid is replaced with a two-way relationship that enables both parties to define and operate together. This perspective allows contextualized improvement mechanisms to be installed and the ties in all directions to be strengthened.

Our experiences of linking educational development with social development have always been positive and have enabled us to make headway in complex social and educational issues, making the identification of educational centers as organizations of and for society a reality. The case of Coyhaique confirms this.

The relation between educational development and social development is obvious and neither can school leaders avoid it nor should they. School leaders' commitment includes sensitivity towards the reality of the environment (i.e., understanding diverse social, cultural, and economic situations), moral obligations towards the most disadvantaged sections of society (i.e., supporting an inclusive school, which achieves quality education that overcomes personal and social circumstances), and being proactive in the development of a more just society (i.e., social leadership, agent of change, encouraging social participation in education, alignment with socio-educational problems).

In any event, the most important finding in Coyhaique (and other similar experiences) is not only the direct effects on the school performance of some students but also the direct and indirect effects that several coordinated action programs in a given area under similar working schemes may generate. Thus, for this experience we can cite:

- The greater involvement of the parents in supporting, monitoring, and ultimately controlling the children's school activities
- The institutionalization of the parents' schools at the different schools
- The involvement of external organizations (such as companies, NGOs, and social institutions) and various collectives (such as managers' associations and freelancers) in the educational subjects
- The promotion of effective continuity between school and extracurricular activities and between actions at the school and actions in the region; complementariness in the support for schools, youngsters, and adults; coordination of actions among different agents, etc.
- The heightened awareness among the town political leaders about the possibility, feasibility, and efficiency of overall local plans or plans by age group
- The intensification of the relations between educational organizations and companies and cultural and social institutions
- The schools' acceptance of their commitment to nonschool space and time
- The development of a new global as opposed to fragmented approach to education

In short, as Tedesco (2010) suggests, contributing to social justice through education entails "expanding our sights on educational problems and incorporating the vision that comes from studies on the profound social, political, economic, and cultural changes that take place in society" (p. 8). It also entails accepting the action of transformation as part of the educational and social process. And managers, teachers, families, students, and social and political agents are all involved in this endeavor.

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Chapter 43
Dominance Without Hegemony: Unmasking Social Injustice Leadership in University Education in Zimbabwe

Munyaradzi Hwami

Introduction

Post-independent Zimbabwe, most significantly the last two decades, has been marked by a crisis of governance (Bond, 2010; Cross, 2011; Ndlovu-Gatsheni, 2009a, 2009b; Raftopoulos & Mlambo, 2009; Tsvangirai, 2011; Zamponi, 2005) that has witnessed an unpopular and dictatorial government, using state apparatus including higher education institutions, to maintain its hold on political power. The rise of dictatorship and authoritarianism, by a state characterised by an alliance of the ruling Zimbabwe African National Union Patriotic Front (ZANU PF) party and the military (Chikwanha, 2009; Gumbo, 2011; Laing & Thornycroft, 2010; Zaba, 2011), has been accompanied by a ruthless and consistent attack on independent critical thinking and opposing voices, and this has had a direct impact on the business of higher education institutions, especially universities. That the government of Zimbabwe is a violent and repressive dictatorship has been widely recognised and documented (Blair, 2002; Bond & Manyanya, 2003; Cross, 2011; Ndlovu-Gatsheni, 2009a; Sithole, 2001). What is further observed are the efforts of the ZANU PF government to rule without the mandate of the people (Dansereau, 2005; Editorial Standard, 2011; Phimister, 2006) and explain the draconian laws and regulations that have been enacted to control and quell opposition and all this accompanied by state-sanctioned violence. In this chapter I utilise Ranajit Guha's analytics and critics that culminated in his thesis of "dominance without hegemony" (Guha, 1997, p. xvii), a situation where a plutocratic oligarchy governs by use of coercion and without the mandate of the people. What is observed in Zimbabwe is the establishment of a ZANU PF empire, "internal colonization" (Mignolo, 2000, p. 27; Quijano, 2000, p. 224) of the people of Zimbabwe by President Robert Mugabe's party that is in alliance

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with a partisan military (see Chikwanha, 2009; Zaba, 2011). Universities by definition critique society for the good of the majority and attempt to fulfil such societal expectations by students and faculty at the University of Zimbabwe and the Great Zimbabwe University have been received with a heavy iron hand by the government, culminating in university administration that operates as an extension of the security arm of the state and giving rise to human rights violations and hence the need to document, explain and authorise these social injustices being perpetrated at the two state universities.

This chapter argues that university education leaders have been turned into Zimbabwe's ruling party activists and state security agents and in the process turning their backs on the fundamental basics that guide education leadership. They have become architects and constructors of social injustice practices; an accusation evidence from their institutions convincingly sustains. It also critically discusses how university vice chancellors have been transformed from superintendents of education to agents of the ruling party there to silence criticism against an increasingly unpopular regime and in the process ignoring all forms of compassionate and ethical leadership expected from such high institutions of learning.

First, though I am grounding my analysis of social injustices in Zimbabwe's universities in dominant strands of social justice theory or policy that dominate the discussion of this topic, this chapter is also strongly informed by my engagement in what I call academic activism, education and research in struggles against the deteriorating conditions of higher education in Zimbabwe, which evolved from my work in Zimbabwe with student movements and faculty associations. I utilise various theoretical frameworks that tend to isolate hegemonic tendencies inherent in neoliberalism and nationalism (Amin, 1989, 2011; Dei, 2010; Fanon, 1952/2008, 1963/2004; Grosfoguel, 2005; Guha, 2001; Shivji, 2011), the two dominant discourses that are shaping the contemporary Zimbabwean narrative. Consequently, the following section of this chapter deals with the critical colonial theoretical frameworks that guided the chapter. This will be followed by the conceptualisation of social injustice within the Zimbabwean context. Views and narratives of students and faculty from the University of Zimbabwe and the Great Zimbabwe University are further captured to landscape the level of social injustices and the accompanying complicity of education leaders. The following and final section considers how the deployment of critical/anti-(neo)colonial analyses and critics excavates university education leaders as accomplices and willing agents in the commission of social injustices to further the international and internal colonialist ambitions of the dominant groups.

Theoretical Framework: Critical Colonial Perspectives

Guha's analysis that culminated in his observation of dominance without hegemony was with reference to British colonial rule in India. Further analysis led him to conclude that "the colonial experience has outlived decolonization and continues to be related significantly to the concerns of our time" (Guha, 2001, pp. 41–42). In Zimbabwe, like in most former European colonies around the globe, the promise of independence from colonial rule never looked like it was going to be fulfilled, and the disappointment of the "post-colonial condition" (Gupta, 1998, p. 7; Kapoor, 2003, p. 73) or the failed promise of colonial and imperial projects of development and globalisation dominates the narration of more than 30 years of the end of British administration. This study is situated from a standpoint that observes the continued existence of colonial, neocolonial, internal colonial and imperial influences on the people of Zimbabwe and consequently notes the myth of independence, "the mythology of the decolonization of the world" (Grosfoguel, 2005, p. 287). Ramon Grosfoguel further noted that "one of the most powerful myths of the twentieth century was the notion that the elimination of colonial administrations amounted to decolonization of the world. This led to the myth of the postcolonial world" (Grosfoguel, p. 287). These critical observations and analyses led me to conclude that the people of Zimbabwe are not independent contrary to the proclamations that were made in 1980, and the rampant cases of social injustices being committed at the University of Zimbabwe and the Great Zimbabwe University are manifestations of the continued existence of colonial influences and relations.

Critical colonial perspectives observe two variants of colonialism in modern day Zimbabwe, global (mostly Western) and local (ZANU PF internal colonialism), and both have had negative consequences on the observation of social justice in higher education. As Shohat (1992) and Shohat and Stam (1994) argued, both colonialism and neocolonialism imply oppression and the possibility of resistance and in the process the inappropriateness of the term "postcolonial as it obscures the traces of colonialism that exist in the present" (Daniel, 2005, p. 262). With neoliberal globalisation and its accompanying radical capitalist trajectories as observed when Zimbabwe adopted IMF and World Bank reforms through structural adjustment programmes in the 1990s, "we continue to live under the same colonial power matrix. … we moved from a period of global colonialism to the current period of global coloniality" (Grosfoguel, 2005, p. 287). A critical colonial standpoint on Zimbabwe, following Grosfoguel's analysis, recognises that even though there has been the eradication of British colonial administration and the organisation of Zimbabwe into a politically organised nation-state with a black African government, Zimbabweans continue to live under Euro-American exploitation and domination through the intrusion and adoption of neoliberal policy frameworks. It is characterised by a "coloniality of power" (Quijano, 2000, p. 216, 2007, p. 170), "imperial globality or global coloniality" (Escobar, 2004, p. 207), which has proved to be longer lasting than Euro-centred colonialism that ended with the attainment of independence from Britain in 1980. "Coloniality refers to the continuity of colonial forms of domination after the end of colonial administrations, produced by colonial cultures and structures in the modern-colonial capitalist world-system" (Grosfoguel, p. 287). Zimbabweans continue to live under the regime of global coloniality imposed by the United States and its allies through the IMF and the World Bank among other Western international institutions. Privatisation and marketisation at the University of Zimbabwe and Great Zimbabwe University and the resultant immiserating situation can be traced directly to the two Bretton Woods institutions. Thus, in Zimbabwe, what is observed is the sustenance of colonial relations from the days of formal European colonial rule to the current post-independence era.

Consequently, this chapter adopted the standpoint that colonialism did not end with the demise of European rule but that other even stronger benign forms of colonialism exist in the south and in Zimbabwe in particular. Neoliberal globalisation represents a new form of imperialism, "benign colonialism that is still underdeveloping Africa and its people" (Abdi, 2006, p. 17), "a process of re/colonization" (Choudry, 2007, p. 97), a form of imperialism where accumulation by dispossession is the main feature (Harvey, 2003) and also seen as a form of Western global hegemony (Tikly, 2004). Most people from the weaker economies, because of the immiseration they endure, at the expense of the extravagant consumption culture found in the Western capitalist world, do not hesitate to see neoliberal globalisation as yet another episode in Western hegemonic tendencies. For instance, Grosfoguel (2005) perceives globalisation as capitalist and Euro-centred colonisation. Along the same lines, McMichael argues that it is a "Western imperial project" (2005, p. 119). It is yet another stage of Western pillaging of weaker societies' resources. It is further seen as "transnational capitalism or collective imperialism" (Amin, 2011, para. 1). This is corroborated by Escobar's observation of the existence of what he calls:

> US based form of imperial globality, an economic-military-ideological order that subordinates regions, peoples and economies world-wide. Imperial globality has its underside in what could be called … global coloniality, meaning by this the heightened marginalization and suppression of the knowledge and culture of subaltern groups. (Escobar, 2004, p. 207)

Following Quijano (2000, 2007) and Grosfoguel (2005), I used coloniality to examine and address "colonial situations" in contemporary Zimbabwe in which colonial administration has been eradicated. By colonial situations, I employ Grosfoguel's understanding that this refers "to the cultural, political, sexual and economic oppression and exploitation of subordinate groups by dominant groups with or without the existence of colonial administration" (2005, p. 288). The condition of Zimbabwe's peasants and workers and of their children at the University of Zimbabwe and the Great Zimbabwe University illustrates political and economic oppression and exploitation. This colonial situation was well captured by A. Cesaire:

> I am talking about millions of men whom they have knowingly instilled with fear and complex of inferiority, whom they have infused with despair and trained to tremble, to kneel and behave like flunkeys. (Fanon, 1963, p. xi)

What Fanon described represents British colonial administration, and it is largely accurate to say that it is being reproduced and repeated in Zimbabwe today by ZANU PF and its aligned military.

Since 1980, the new nation-state of Zimbabwe, following the dominant Eurocentric liberal discourses (Bloom, 2004; Petras & Veltmeyer, 2001; Wallerstein, 1995), "constructed ideologies of national identity, national development and national sovereignty that produced an illusion of independence, development and progress" (Grosfoguel, 2005, p. 288), yet the economic and political system (parliamentary democracy and neoliberal capitalism) was largely shaped by its subordinate status in a capitalist world system organised around a hierarchical international division of labour (Wallerstein, 1995). This is illustrated by Zimbabwe's current growth strategies, namely, the Short Term Emergency Recovery Programme (STERP) and Medium Term Plan (MTP), which seek to "establish a framework for Zimbabwe to emerge as a vibrant, private sector-driven economy" (Herald Reporter, 2010, para. 7). Despite President Robert Mugabe's anti-Western rhetoric and strained relations with the Euro-America bloc, his government's nationalist posturing is nothing but a Eurocentric response or solution to a Eurocentric global challenge. His authoritarian nationalist paradigm is authoritarian and anti-democratic as was British colonial administration before 1980 and hence produces an internal coloniality of power within Zimbabwe.

It would be misleading to portray "the postcolonial situation" (Ake, 1996, p. 3) or the failed promise of development and modernisation as only about the devastation caused by Western modernist experiments. I note that it is also about forms of "internal colonization" (Mignolo, 2000, p. 197) and, with specific reference to Zimbabwe, the impact of ZANU PF authoritarian nationalism (Bond, 2010; Bond & Manyanya, 2003; Dansereau, 2005; Ndlovu-Gatsheni, 2009a, 2009b; Raftopoulos, 2003). Although political independence brought some changes to the composition of state administrators, the character of the state remained much as it was in the colonial period (Ake). Kapoor noted and concluded that:

> Anti-colonial nationalist movements (as a significant expression of decolonization), have rarely represented all interests and peoples of a colonized country…Neither did the dismantling of colonial rule automatically result in positive changes for all groups, as the fruits of independence were made available unevenly and selectively; a version of colonialism was reproduced and duplicated from within. (2009, p. 4)

Similarly Dei noted that "colonial in this context is understood as not simply foreign or alien but as anything imposed and dominating" (2010, p. 13). These views aptly capture the character and nature of ZANU PF hegemony. Grosfoguel (2005) concluded that "nationalism is complicit with Eurocentric thinking and political structures" (p. 289) further excavating the capitalist and exploitative nature of nationalism. In the process, Zimbabwe is witnessing kleptocratic capitalism (Barber, 2004; Nonini, 2005; Tandon, 2011):

> the creation of fictitious wealth without going through production of real wealth and political governance controlled by looters and daytime robbers. It is rent seeking by the rich nations, and within each nation by the rich economic and power elite. This creates at the opposite polar end the dispossession and disempowerment of the masses of the people. (Tandon, 2011, para. 6)

University students and faculty have rightly observed and criticised these developments, and in response the government has used all resources at its disposal and in the process trumping students and faculty rights and hence committing social injustices.

It is against such observations that "anti-colonialists" (Dei, 2010, p. 1) or "critical colonialists" (Kapoor, 2011, p. ix) tend not to subscribe to the view that we are in a post-colonial era. The end of European rule ended physical British administration in Zimbabwe (as was in other colonised countries), but the world economic order dominated by the Washington consensus has maintained Western dominance over the former colonies, thus the idea of American globalism/colonialism illustrated by development and globalisation projects that have dominated the world. Furthermore, the African liberators who took over power from colonial European administrators have mostly turned out to be crocodile liberators, far much worse than the foreign colonisers. President Robert Mugabe of Zimbabwe (32 years in power) belongs to the same league with the late Gaddafi of Libya. They represent internal colonisation, and the exuberant joy expressed by Libyans showed the people were being freed from some form of colonial rule. Similarly contemporary Zimbabwe is characterised by international/foreign colonialism (Euro-American and Chinese, mostly) and internal colonialism (a dictatorship by the ruling elite as demonstrated by the narratives from those at the University of Zimbabwe).

Conceptualising Social (In)justice Leadership in the Context of Zimbabwe

Developing a universal definition of social (in)justice has been a struggle for many scholars, human rights practitioners and activists in different fields. The concept of social (in)justice has been employed as a rationale for various causes including maintaining the status quo, promoting social reforms and justifying revolutionary action (Reisch, 2002). Ira Bogotch utilised Dewey's insights to argue and conclude that it is significant to have multiple perspectives on social justice (Bogotch, 2000). Thus, social (in)justice has multiple meanings, mainly varying with perspectives "on the nature of the self, the basics of moral law, the role of the state, and the relation between individual rights and the common good" (Caputo, 2002, p. 356). However, the universalism of certain basic human rights should be acknowledged. In Zimbabwe oppressive and undemocratic laws have been enacted mostly since 2000, and the government justifies such authoritarianism on the idea that the country is undergoing an economic revolution that involves transferring economic means of production to black indigenous Zimbabweans (Caplan, 2008; Government of Zimbabwe, 2007; Moyo, 2011; Raftopoulos, 2011), and this has created unfair opposition mainly from Western countries and locals supported and sponsored by these countries. Resultantly, almost all national institutions, and of importance here universities, have become sites where infringement of social (in)justices has become rampant on the conservative pretext of defending national independence and sovereignty.

Commentators and scholars of social (in)justice issues trace the different interpretations of the concept to classical thinkers such as Plato who stressed harmony as the main condition for the attainment of social justice and Aristotle who emphasised the regulation of the allocation and distribution of benefits or resources (Bell & de-Shalit, 2003; Capeheart & Milovanovic, 2007; Caputo, 2002; Miller, 1999; Reisch, 2002). The continent of Africa and Zimbabwe in particular has been an arena of human rights injustices stretching from colonial times to contemporary post-independent era

(Ayittey, 1992; Caplan, 2008). African governments tend to label advocates of social justice as Western emissaries and agents of neocolonialism attempt to introduce Euro-American values that will ultimately see the triumph of global capitalism. This is largely accurate of the government of Zimbabwe since 2000. Zimbabwe has been undergoing a process of massive transfer of national resources from whites of European descent to indigenous Zimbabweans (see the Government of Zimbabwe, 2007). From a post-colonial and anti-colonial standpoint, the Zimbabwe state's policy is aimed at establishing a just society. However, post-independent Zimbabwe has been observed to be a replica of European colonial administrative systems (Hwami, 2011), and consequently, as was the case during British colonial rule and as has been widely observed elsewhere, the roots of social injustice lie in political-economic structures that are based on subjugation, discrimination, violence, exploitation and privilege (Berlin, 1996; Reisch, 2002).

This chapter borrows from Bates' (2006) and Foster's (1986) contention that social justice is central to the pursuit of education and therefore should also be central to the practice of educational administration or leadership. I am swayed by the conception of educational leadership as a "deliberate intervention that requires the moral use of power" (Bogotch, 2000, p. 2). It is observed that the missing space in educational leadership, "that is, the roles of persons occupying hierarchical positions in formalized, educational institutions" (English, 2011, p. vii), as in national governance is the ethical. The neoliberalisation of the economy has not been accompanied by the granting of any individual liberties, and hence, this chapter notes the incompatibility of neoliberal universities in an authoritarian nationalist conservative environment. Such inconsistencies have led to social injustices being perpetrated in higher education in Zimbabwe.

The idea of social justice employed in this chapter borrows from a variety of definitions that have been put forward by some notable scholars. To Plato "justice consists in the set of enforceable rules that have the effect of promoting the greatest possible amount of happiness", while Rawls conceived justice as "consisting in the equal distribution of social primary goods such as liberty, opportunity and wealth" (Bell & de-Shalit, 2003, p. 1). Others similarly note that "social justice has to do with the way in which benefits and burdens are assigned to individuals" (Miller, 1999, p. 2), "the various philosophies attending to the fair allocation of resources as well as of burdens" (Capeheart & Milovanovic, 2007, p. 3), and that "social justice supports a process built on respect, care, recognition and empathy" (Theoharis, 2007, p. 223). Nancy Frazer argues that social justice today requires both redistribution and recognition because both socio-economic injustice and cultural injustice are rooted in the processes and practices that systematically disadvantage some groups of people (Frazer, 1995). This is seen as a challenge to be tackled head on if marginalisation of certain segments of the populations is to be averted (Marshall, 2004).

Despite the above conceptualisations and understandings being rooted in Western sociocultural and political contexts, their applicability to African and Zimbabwean setting cannot be contested. The idea that the concept of social justice is "Western" tends to be used by those who want to mask themselves from international criticism because of their policies and practices. Killings, beatings, ethnicism/tribalism and so forth are social injustices, even from traditional African perspectives. For instance, the Zimbabwean traditional philosophy of *unhu* emphasises sharing, peace and harmony in society (Battle, 2009; Shizha, 2009; Swanson, 2007; Venter, 2004), and these are the same tenets informing the idea of social justice as presented in Western societies. Thus, though this chapter employed Western definitions, what they entail is progressive humanism, and it applies to whites, blacks and all other colours. The Zimbabwean culture has never tolerated the suffering as seen at the University of Zimbabwe.

Consequently, for the purposes of this chapter, the concern is with the ways in which a range of social institutions and practices together influence the sharing of resources available to different people. There is no question that the government of Zimbabwe is the primary institution whose policies and practices contribute to social (in)justice. Along such observations I concur with the views that social justice requires the elimination of institutionalised domination and oppression (Frazer, 1995; Miller, 1999; Young, 1990) and that "it is the exercise of altering institutional and organizational arrangements by actively engaging in reclaiming, appropriating, sustaining and advancing inherent human rights of equity, equality and fairness in social, economic, educational and personal dimensions" (Goldfarb & Grinberg, 2002, p. 153). All these observations and understandings of social justice informed the definition of social (in)justice employed in this presentation.

However, the work of Young (1990) and Goldfarb and Grinberg (2002) who collectively address the issues of social (in)justice on institutional arrangements that oppress and marginalise some groups largely shapes my understanding. This chapter defines social injustice educational leadership to mean that university administrators consider issues of democracy, individual liberties, ethnicity, class and gender among other national historical factors. Social justice university administration must not sacrifice the universally acknowledged mandate of a university for political expediency and patronage. This conceptualisation of social (in)justice is concerned with the redressing and advancement of university education of the poor rural peasant student, the disadvantaged girl child and the politically active youths who cry to have their voices heard on the future of their country. The view also places the realisation of social justice and the democratic development of the post-independent nation of Zimbabwe on the significant role of the university and hence its leadership. William Rainey Harper (1905, pp. 19–20) cited by Ira Harkavy identified the university as the most strategic agency or national institution best positioned to bring about social justice. He said:

> The university, I contend, is this prophet of democracy-the agency established by heaven itself to proclaim the principles of democracy. It is in the university that the best opportunity is afforded to investigate the movements of the past and to present the facts and principles involved before the public. It is the university that, as the center of thought, is to maintain for democracy the unity so essential for its success. The university is the prophetic school out of which come the teachers who are to lead democracy in the true path. It is the university that must guide democracy into the new fields of arts and literature and science. It is the university that fights the battles of democracy, its war-cry being: 'Come, let us reason together.' It is the university that, in these latter days, goes forth with buoyant spirit to comfort and give help to those who are downcast, taking up its dwelling in the very midst of

> squalor and distress. It is the university that, with impartial judgment, condemns in democracy the spirit of corruption, which now and again lifts up its head, and brings scandal upon democracy's fair name …. The university, I maintain, is the prophetic interpreter of democracy; the prophet of her past, in all its vicissitudes; the prophet of her present, in all its complexity; the prophet of her future, in all its possibilities. (Harkavy, 2006, p. 7)

The definition being used here associates the observation of social justice with ethical university leadership, thus placing a huge responsibility on the shoulders of university leaders in Zimbabwe. University administrators should offer "transformative leadership" (Astin & Astin, 2000, p. 11; Shields, 2004, p. 113) that is deeply rooted in moral and ethical values in a social context (Shields, p. 113). Astin and Astin summarise in these words their hope that transformative leadership may help to change society:

> We believe that the value ends of leadership should be to enhance equity, social justice, and the quality of life; to expand access and opportunity; to encourage respect for difference and diversity; to strengthen democracy, civic life, and civic responsibility; and to promote cultural enrichment, creative expression, intellectual honesty, the advancement of knowledge, and personal freedom coupled with responsibility. (2000, p. 11)

Thus, university education leaders should be found protecting students and staff against police brutality, promote responsible academic freedom and ensure students from vulnerable sections of the Zimbabwean society gain access to and remain within university education. Vice chancellors and other top university administrators should realise that they are potentially architects and builders of a new social order wherein traditionally disadvantaged peoples have the same educational opportunities and experiences as traditionally advantaged groups.

Research Methodology

This was a "critical interpretive research" (Anderson, 1989, p. 249; Bartlett, 1991, p. 21; Fossey, Harvey, Mcdermott, & Davidson, 2002, p. 720), and this approach was employed in order to arrive at in-depth insights and understanding into the issues and cases of social (in)justice in higher education. It was a case study (Merriam, 2009; Stake, 2005; Yin, 2009) of the University of Zimbabwe and the Great Zimbabwe University. It has been established that critical interpretivists seek research accounts that are sensitive to the "dialectical relationship between the social structural constraints on human actors and the relative autonomy of human agency" (Anderson, p. 249). "It is critical in that it shows how people's own understanding of their situation are implicated in their unhappiness and how the structures that produce and are reproduced by those understandings trap people in situations that they find frustrating and oppressive" (Robinson, 1992, p. 345). With that in mind the influence of ZANU PF authoritarian nationalism and neoliberalism on social justice issues had to be understood as well as the participants' views based on their experiences. In such a critical interpretive case study, "the researcher builds a complex, holistic picture, analyzes words, reports detail views of informants and conducts the study in a natural setting" (Creswell, 1998, p. 15).

It is generally acknowledged that research that aspires to be critical seeks, as its purpose of inquiry, to confront injustices in society. Its purpose is "to reassert the basic aim of the Enlightenment ideal of inquiry: to improve human existence" (Giarelli, 1992, p. 4). Critical inquiry is "disruptive, explicitly pedagogical and radically democratic; its topics: fascism, the violent politics of global capitalist culture, the loss of freedom in daily life" (Denzin, Lincoln, & Giadina, 2006, p. 777). The overriding goal of critical interpretivism "is to free individuals from sources of domination and repression" (Anderson, 1989, p. 249). The victimisation of students and faculty by state agents, police and the military (Makoni, 2007; Students Solidarity Trust, 2009; Zeilig, 2007, 2008; Zimbabwe National Students Union, 2010) and the immiseration caused by neoliberal policies (Hwami, 2010, 2011) are injustices by any definition. Therefore, the critical interpretive approach was employed bearing in mind the ultimate desire to end oppression and suffering. This was activist research, research with a human face aiming at authorising social injustices and in the process hoping to build consciousness among participants of the context of their challenges.

Practical Perspectives on Social Injustice Leadership in Higher Education

The centrality and significance of schooling in general and higher education, particularly universities, in the promotion of national social justice has been widely established (Bollinger, 2003; Harkavy, 2006; Theoharis, 2007) and by further implication the importance of the role of education leaders in the successful attainment of this mandate (Astin & Astin, 2000; Marshall, 2004; Shields, 2004, 2010). As was recognised by Bogotch (2000) and repeated by Larson and Murtadha (2002), Goldring and Greenfield (2002), Reisch (2002), Bates (2006) and Theoharis (2007), educational leadership should utilise moral interventions in the protection of the weak and marginalised and in the process uphold and inform national social justice discourse. Also Miller (1999) noted that the state is the primary institution whose policies and practices contribute to social justice or injustice, and this is more so in societies with weaker economies where the state is involved in almost all facets of the nation. This is also an accurate portrayal of Zimbabwe, and utilising stories and experiences of students, faculty and administrators from the University of Zimbabwe and the Great Zimbabwe University, this section of the chapter explores and analyses the social injustice situation in Zimbabwe, further arguing that the picture can also be transferred to other similar state institutions. The close to total decline of the rule of law and the poor human rights record of the country can arguably be traced to the failure of higher education, especially universities to perform their core business satisfactorily. Lee Bollinger emphasised the eminent role of the American university, and this is universally true of any university:

> Universities remain meaningful because they respond to the deepest of human needs, to the desire to understand and to explain that understanding to others. A spirited curiosity,

> coupled with a caring about others (the essence of what we call humanism) is a simple and unquenchable human drive, certainly as profound an element of human nature as the more often cited interests in property and power, around which we organize the economic and political systems. (Bollinger, 2003, p. A20)

While acknowledging the significance of the university, one cannot but observe the way university leadership in Zimbabwe has been turned into political party functionaries by the ruling Zimbabwe African National Union Patriotic Front (ZANU PF) party. According to Section 7.1 of the University of Zimbabwe Act (UZ Act) and the Great Zimbabwe University Act (Chapter 25: 24), "The president of Zimbabwe shall be the Chancellor". Furthermore, Section 8.1 states that the chancellor appoints the vice chancellor, and Section 8.3 a-f empowers the vice chancellor to:

1. Prohibit the admission of a student or any person to the university.
2. Prohibit, indefinitely or for such a period as he may specify, any student or group of students from attending any class or classes.
3. Prohibit any student or group of student or person or group of students from entering or remaining on such part or parts of the university campus as he may specify.
4. Expel or suspend, indefinitely or for such period as he may specify, any student or group of student.
5. Dissolve or suspend, indefinitely or for such a period as he may specify, the students' union or any of its committees or organs, or prohibit or suspend, indefinitely or for such a period as he may specify, any activity or function of the students' union or any of its committees or organs.

The University Act appears to be giving the vice chancellor arbitrary and excessive powers, and evidence profoundly shows that vice chancellors have been willing state agents, utilising these monstrous powers with devastating impact on students and faculty. This has been interpreted differently by the university community, but stories and real experiences from faculty and students lead one to conclude that educational leadership in Zimbabwe is compliant and complicit in the commission of social injustices. The Zimbabwe National Students Union (ZINASU) argues that the vice chancellor is endowed with unchecked powers and this has contributed to the collapse of the university (Students Solidarity Trust, 2009). Such perceptions are widely shared within the university community where some consider that the powers of the vice chancellor are intended to control and discipline academics and have nothing to do with the promotion of learning. Some students and faculty members had this to say about the vice chancellor's powers:

> The Vice-Chancellor is beholden to the state president; he throws away academic freedom for the convenience of keeping his post. He enjoys the benefits and those who appointed him expect patronage. (Interview notes, Faculty member, July 2010)

The view expressed by students is widely shared by the university community and portrays the way the vice chancellor's office is perceived. It is not seen as a professional administrative organ of the university but an extension of the dictatorial ruling party structure. To affirm this observation, other students shared their experiences and one of them said:

> On the 14th of January 2010 we had a demonstration against high fees and 28 students were arrested, spent three nights in cells and later released on free bail. When I returned to campus I was suspended and they were citing section 30 of the University Act or Ordinance 30 which gives the Vice Chancellor powers to suspend anyone. I was accused of bringing the name of the institution into disrepute. On the 30th of July we were acquitted because the witnesses could not prove a prima facie case against us. I then went to the university to negotiate my reinstatement as a student but unfortunately they are refusing to take me back. I am on two years suspension and currently engaging lawyers from the Zimbabwe Human Rights Association. We were accused of contravening section 37 of Public Order and Security Act, which said that it was an illegal gathering with the intention of promoting public disorder. The Vice-Chancellor and the university are saying their decision is final regardless of the fact that I was acquitted by the magistrate. The bottom line is I was involved in a demonstration. Precedence has it that one Levy Nyagura (University of Zimbabwe Vice-Chancellor) is well known for contempt of court, defying court orders. There is Lovemore Chinoputsa former secretary general of ZINASU and Promise Mukwananzi, former president of ZINASU they challenged their suspension and were ordered to go back to college but Nyagura told them that they must go and learn at the high court. (Interview notes, Student leader, August 2010)

Along the same line another student activist's narrative equally showed social injustices committed by university administrators:

> I have been arrested 13 times now and with university administrators, you attend a well-managed disciplinary committee and you get suspended for a year, minimum. The moment you are arrested you get a year's suspension. In 2006 I managed to escape arrest but my friends were captured by the police and they got suspended for periods ranging from 1 to 3 yrs. In 2008 we had a demonstration over presidential elections; we were with other students from the whole country. My results for that semester were held and I was later told they were to be nullified. This year (2010) in January we demonstrated in support of expelled students and I was arrested. I then got a year's suspension up to September 14. I am not hopeful because it is well known that the Vice-Chancellor does not respect court rulings. (Interview notes, Student activist, August 2010)

Students and faculty, like many other Zimbabweans, view the government as a violent dictatorship that does not respect the rights of its citizens (Bratton & Masunungure, 2008; Caplan, 2008; Cross, 2011; Makumbe, 2002; Mamdani, 2008; Meredith, 2007; Ndlovu-Gatsheni, 2009a; Raftopoulos, 2011; Raftopoulos & Mlambo, 2009), and hence, there is high expectation for national institutions such as universities to do better by intervening. The silence of the grave coming from the professoriate over critical and pertinent issues such as social injustice even within their workplace has been so outstandingly disturbing that one national daily newspaper ran a headline entitled "Where are Zimbabwe's academics?" and further claimed that:

> Newspapers fail to get brave academics who are prepared to comment or be interviewed on burning economic, political, social or business issues affecting the country, but prefer to shamelessly hide behind those brave enough to stand up and be counted regardless of the consequences. (Karoro, 2011, para. 3)

The noble function of modern universities as argued by Harkavy (2006) and Bollinger (2003) appears to be missing in Zimbabwean universities. Universities are expected to speak out for the good of their society and not just for selfish ends.

Along the same argument, Larson and Murtadha posited that, "university professors have an obligation to provide independent criticism of their society and its institutions and to generate theories and policies that enhance the public good" (2002, p. 135). The above sentiments from those in university, national observers and social justice scholars persuade some to conclude that the post-independent university leadership in Zimbabwe is to a certain extent responsible for the prevalence of social injustice.

Another perspective considers the intimidating environment academics have been operating under especially since 2000 when the widely accepted value of freedom of the academy was openly trampled upon and students started to be expelled for expressing views against the government and faculty are refused tenure for criticising the establishment. While scholars of social justice leadership would like to see educators taking the lead in promoting and shaping social justice and social justice theories (Bogotch, 2008; English, 2011; Brooks & Kensler, 2011; Shoho, Merchant, & Lugg, 2011), in Zimbabwe university leaders are used as an arm of the state security apparatus to control a largely restless university community and nation. However, university professors and students face persecution for criticising their society, and vice chancellors, registrars and other top administrators are appointed on the basis of party loyalty and not professionalism. The following is a story of one faculty member's experience with the university administration that provides credence to the above view:

> I was the secretary general of the lecturers' union and I was seen as a threat to the Vice-Chancellor. At one time I was suspended for three weeks and other lecturers fraternized with me and went on strike. Many at times I would not take two weeks without being called to the Vice-Chancellor's office. I was told that if one differs with the Vice-Chancellor it was only that person that would leave as the Vice-Chancellor was appointed by the state President and would not go. When I applied for my tenure, whereas the department and external examiners recommended that I should be granted tenure, the Vice-Chancellor decided that I was an academic terrorist who should leave the university, who could not be given tenure and should be taught about the ethics of research. This was because I had written an article over the death of Hebert Chitepo that highlighted the different elements involved in the death of Chitepo and these included some presently in the ruling party, ZANU PF. This was seen as unacceptable. The Vice- Chancellor said a university where the chancellor was the state President could not be seen to harbour lecturers with such minds. I also wrote another article that considered the crisis situation in Zimbabwe, looking at whether President Mugabe had become an asset or a liability to the nation. Again to my surprise this was deemed to be dangerous and was seen as an academic terrorist who was criticising the President. The university later communicated that my services were no longer needed. (Interview notes, Faculty member, August 2010)

What is observed is the politicisation of the university and education leaders in these institutions have become integral elements of the ruling regime and unfortunately constructors of social injustice as they work to please their political parties and not furthering educational aims of the university.

Zimbabwe's state universities have students predominantly from poor rural peasant backgrounds and/or lowly paid working class civil servants (Hwami, 2010; Zeilig, 2008; Zeilig & Ansell, 2008), and one would have expected university vice chancellors to have compassion and positively intervene to alleviate the negative influence of "market fundamentalism" (Anderson & Pini, 2011) that currently guides universities (Levidow, 2005; Nafukho, 2004; Shizha, 2006). The immiseration brought about by failed economic policies accompanied by corruption and undemocratic leadership of the government demands university education leaders to play a "stewardship role" (Goldring & Greenfield, 2002, p. 4), "act as moral stewards" (Murphy, 2002, p. 67), "lead by empowering" (Sergiovanni, 1992, p. 34) and provide "bridge leadership that connects education and social justice" (Tooms & Boske, 2010). These descriptors confirm the importance of moral education leadership, and when students gather at the University of Zimbabwe to discuss high tuition fees, they are met by campus and state security agents and student leaders face immediate suspension pending expulsion regardless of ruling from the courts of law.

Miller (1999) addressed the issue of access to education as a social justice aspect, especially when institutional arrangements make it difficult for students from certain societal backgrounds. Miller wrote:

> If we are genuinely concerned about social justice, therefore, we must apply its principles to substate institutions that individually or together produce distributive effects that range across a society. Take as one college admissions. …the overall result is important from the point of view of social justice, not only because higher education is a good in its own right, but because who receives it also determines in the long run the allocation of many other benefits. (1999, p. 12)

The adoption of neoliberal policies in Zimbabwean universities accompanied by the dollarisation policy that stipulates that all tuition fees are to be paid in United States dollars has restricted the opportunities for university education of many students (see Student Solidarity Trust, 2009 and/or Zimbabwe National Students Union, 2010). These studies show that students from poor rural backgrounds, ethnic minorities and girls are facing difficulties to enter university, and those admitted encounter many challenges that are not conducive for any meaningful university career. This is what Nancy Frazer called "socioeconomic injustice that systematically disadvantages some groups of people vis-à-vis others" (Frazer, 1995, p. 72). At the University of Zimbabwe, the condition of these weaker sections of the student body has been exacerbated by the university leaders' decision to close campus halls of residence and consequently forcing all students to seek accommodation as renters in the surrounding suburbs. One study found out that:

> The halls of residence have been shut, students eat from informal roadside caterers and students' vocational loans are not available. It emerged early this year that 28 % of students had dropped out of the University of Zimbabwe. Students have been struggling to raise fees of between US$300 and US$1 500 in a country where civil servants earn less than US$300 per month and unemployment is pegged at 90 %. (Muzulu, 2010)

In corroboration another study noted that:

> On July 9 2007, the Vice-Chancellor of the University of Zimbabwe, Professor Levi Nyagura ordered the closure of halls of residence in 30 minutes-rendering the estimated 4,500 student population homeless. This was two weeks before crucial end of year examinations and during a pretty cold winter spell. Students continue to long for the day when professionalism returns to colleges. Indeed, the current crop of college administrators continues to do ZANU PF (PF)'s bidding at the expense of students nationwide. They are condemning the country to a future where all educated minds will have to be imported. The culture of getting instructions

> from a political office must cease in order to enable full recovery of the education system. (Student Solidarity Trust, 2011, p. 13)

As a result of such administrative policies, some have observed that:

> About 20 students share a guestroom in the main house and there are 11 illegal wooden cabins, which house more than 45 students. Most house owners collect between US$20 and US$40 in rentals a month from each student. These landlords are making a killing from the students' predicament. Our landlord collects over US$3 200 every month, as there are more than 80 students each paying US$30 per month. (Share, 2009)

And one of the student activists I interviewed told me that; "I am staying in a garage and we are 13 in that room. We pay US$ 25 a head per month" (interview notes, student activist, August 2010). Along the same lines the following views were captured and they corroborate Frazer's (1995) notion of socio-economic injustice:

> Enrolment figures have been affected. In 2009 students failed to raise US$105 dollars as registration and many couldn't take up places. We ended up taking people with as low as 3 points and in the past we could come down to 7/8 points in critical areas. This has lowered down our standards. Some are still to finish their studies. Those who can manage to pay have political contacts or relatives outside the country. For us education is not only about understanding the world but a tool for better life and for most of these people this is the end of any dream of social mobility. (interview notes, faculty members, July 2010)

Furthermore, government funding policy for students has been shrouded in controversy and characterised by nepotism and party cronyism. Government has been accused of using the student loan systems as a bait to control student activism. A report that was tabled in Zimbabwe's parliament exposed the politicisation of government's funding policy, the cadetship system. Part of the report said:

> The Committee on Higher Education, Science and Technology said a probe it conducted recently found that the country's so-called cadetship programme was highly politicised, benefiting mainly President Mugabe sympathisers. Parliament said the cadetship programme's criteria for selection were discriminatory, ranging from political affiliation to faculty preference. It said that proof of the partisanship of the cadet scheme was the recent withdrawal of the funding of 12 students, on the grounds that they supported the Movement for Democratic Change, a rival party to Mugabe's ZANU PF. (Mashininga, 2011)

What is being observed is the commodification of university education in Zimbabwe, and in a country where academic qualifications are inflated and education for the majority is mainly for economic purposes, some of these young women and man are destined to struggle in their adult life. All this is seen against the luxurious working and living conditions of the top administrators some of whom enjoy conditions similar to cabinet ministers.

Critical Colonial Perspectives: Talking Social Injustice Truth to Hegemonic Powers

The critical and/or anti-(neo)colonial lenses used in this presentation consider the post-independent nationalist government of Zimbabwe as a continuation of British settler administration, neocolonial system of governance characterised by authoritarian elite nationalism, a dominating class, black skins in white masks, following Fanon's (1952) observations. The structural mode inherited from colonialism has dominated state and higher education administration in post-independent Zimbabwe. During the same period, the Zimbabwean state has slowly transformed itself into a force behind internal colonisation of the people of Zimbabwe, black neocolonialists (Ayittey, 1992), characterised by the use of state security agents to silence the people and force them to vote for President Robert Mugabe and his party. Dictatorships retain power through all means necessary, and in Zimbabwe the government of Zimbabwe has not hesitated to use force and violence to quell any attempts at undermining or criticising it (Moyo, 2011, para. 3). It is also a well-established fact that the fight and struggle for human rights and democracy in Zimbabwe has been spearheaded by civic groups of which the student union has played a pivotal role (Chikwanha, 2009; Chimanikire, 2009; Hwami, 2010; Makumbe, 2002; Muzulu, 2010; Tengende, 1994; Zeilig, 2006, 2007, 2008; Zeilig & Ansell, 2008). As a result government policy has been to ensure that strategic institutions are administered by loyal party cadres who are prepared to work for the ruling party in its grand scheme of governing Zimbabwe regardless of the wishes of the people.

In terms of university leadership, this has seen the appointment of vice chancellors, who are loyal to the ruling ZANU PF party, party functionaries whose allegiance and interests are defined by party manifestos and not educational considerations. This has not gone unnoticed by the university community, particularly students and faculty. While scholars of educational leadership have called for moral leadership that aims at fulfilling societal and institutional educational objectives (Bates, 2006; Bogotch, 2000, 2008; Murphy, 2002), the Zimbabwean university is being led by a cabal of political appointees, party activists in PhD gowns masquerading as education leaders. Their brief seems to be dominated by the agenda that they should silence student, and faculty political activities geared against the ruling party and government, and evidence shows that they have not been failing their political masters. Student arrests, assaults, suspensions and expulsions have become common as statistics on the Table 43.1 indicate.

Social injustices have been committed on students by those that society would expect to be the protectors of students, and they justify their actions on the pretext of safeguarding the gains of national independence and sovereignty. University administrators, in trying to please their pay masters, have ceased to be educational stewards or superintendents of education, but agents of a dictatorial state. In return they have been rewarded with ridiculous hefty packages and their portfolios equal a cabinet minister; hence, they have joined the gravy train, the new indigenous kleptocrats (Cross, 2011; Tandon, 2011).

The intermediary dictatorship or authoritarian space dominating university leadership and giving rise to social injustices could be viewed as the major signifier of the Zimbabwean education crisis that has been witnessed since the turn of the new millennium. It reveals a strong tension between Western democracy and human rights tradition that often are illusions of modernity and a tradition that sometimes reflects the monarchical, patrimonial and harmonious mythical traditional past. The unethical and crisis-ridden space has been a great problem since independence;

Table 43.1 2009 reported cases of violations to students by category, adopted from the Students Solidarity Trust

Category of rights violated	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Unlawful arrests	0	6	3	55	1	2	2	14	6	7	18	10	124
Unlawful detention	0	6	3	55	1	2	2	18	6	7	18	10	128
Torture/abductions	0	0	0	0	0	0	0	0	0	0	0	0	0
Expulsion/suspension	0	2	0	10	2	0	9	0	11	9	0	0	43
Assault	0	0	0	3	0	0	1	0	0	5	1	0	10
Political victimisation	0	0	0	0	0	0	1	0	0	0	0	0	1
Freedom of association/movement/expression	2	0	0	0	0	0	0	0	0	5	0	0	7
Death threats	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	2	14	6	123	4	4	15	32	23	33	37	20	313

rather than being a step in the imagined development process, it has been the locus of paradoxes that call into questions the modalities and implications of modernisation and democratisation of Zimbabwe. The human rights discourse, and resultantly the social justice debate, is dominated by scholars from the Euro-America bloc of countries and can reasonably be defined as Western culture. But the Zimbabwean state and university, as well as university educational leadership, are seen as oscillating between tradition and modernity (Westernisation) depending on the circumstances and when they suite their hegemonic tendencies. Furthermore, the Western neoliberal university model has been adopted with no government intervention measures to alleviate the immiserating conditions of students from vulnerable groups and giving rise to distributive social injustice concerns (Frazer, 1995), and on the other hand, personal and individual liberties much valued in Western ideologies are shunned and ridiculed as un-African and foreign to Zimbabwe. It is from observing such contradictions and inconsistencies that I observe what can be described as education leadership constructed social injustices in the Zimbabwean university. As agents of the state, university education leaders, led by vice chancellors, are complicity in the commission of social injustices on students and faculty.

Conclusion

In this chapter I used critical colonial or anti-hegemonic analysis and critics to isolate institutional social injustices as a creation of those who seek power and domination without the concern of the people. The ideologies of authoritarian neoliberalism and nationalism are considered as hegemonic and hence behind the prevalence of social injustices in Zimbabwe. British colonial governance was obviously foreign and exploitative with resource exploitation as the main occupation, and it was expected that post-independent Black Nationalist government would be different. Thirty years into independence, echoes of frustration have been resounding throughout the country, and the ruling Zimbabwe African National Union Patriotic Front party has roped in universities in its quest for eternal power. During times when the attention is on the moral focus of educational leadership, university education leaders in Zimbabwe are being found wanting; they have a social and moral obligation to foster social justice practices. Unfortunately, evidence shows that they are political party activists and agents, whose policies are geared at pleasing those who appointed them. Consequently the challenge is that educational leaders in Zimbabwe should increase their courage, intelligence and vision (Jean-Marie, Normore, & Brooks, 2009) and help end the commission of social injustices in their institutions and by extension throughout the Zimbabwean society.

The fundamental role of universities and university leaders in any society cannot be underestimated, and this chapter encourages all efforts to achieve social justice in the Zimbabwean university. Hegemonic forces, notably neoliberalism and nationalism, are corroborating in transforming the university superintendent into an agent of authoritarian political and economic dominance. Against such a disturbing background, I end my effort to expose and hopefully end social injustice at the University of Zimbabwe and the Great Zimbabwe University by speaking for dissident students and faculty and to hegemonic powers, with a defining quotation from a renowned African writer, the brilliant Ngugi wa Thiong'o:

> Our lives are a battlefield on which is fought a continuous war between the forces that are pledged to confirm our humanity and those determined to dismantle it; those who strive to build a protective wall around it, and those who wish to pull it down; those who seek to mould it and those committed to breaking it up; those who aim to open our eyes, to make us see the light and look to tomorrow … and those who wish to lull us into closing our eyes. (1987, p. 53)

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Part VI
Glocal Policy Interventions

Chapter 44
Inclusive Education for Children with Special Needs: The Case of Lebanon

Ahmad Oweini and Heyam Lutfi El Zein

Introduction

Many remembrances in the last 50 years have emphasized how movements for social justice helped to define the history of the countries that developed it (1964 Civil Rights Act, 1954 decision for desegregation of schools…). These remembrances and others have played an important role in how school leaders turned out to be social justice advocates and activists. Dantley and Tillman (2006) have framed the concept of social justice in the field of education around several issues including race, diversity, poverty, marginalization, gender, spirituality, age, ability, and sexual orientation. Most Middle Eastern governments have tried to provide appropriate remembrances to promote social justice but were not able to implement and empower school leaders by these abilities. The case of Lebanon is not an exception. The purpose of this chapter is to establish functional administrative management reforms in favor of social justice leadership and moral responsibilities of school leaders and their communities as they advocate for the inclusion of students with special needs. This reform should be based on international standards and cultural considerations. This chapter argues that fostering social justice starts with reestablishing ethics of care, education, and integration of what is social justice and how to seek it and to question what is and what is not, what practices have to be developed, and what skills have to be acquired. The main intent of this particular intervention program is to create a positive school environment encouraging collaborative partnership with constructive ramification towards management of social justice for children in appropriate and innovative way in the community.

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International initiatives have been taken to support inclusive education. The UNESCO Salamanca Statement (1994) calls on the international community to endorse the approach of inclusive schools by implementing practical and strategic changes. The UN Convention on the rights of the child contains several articles which taken together provides the right to inclusive education.

These initiatives have lead to a considerable growth in the literature on integration and inclusive education (Jenkinson, 1997). In general, it has headed in three main directions: understanding the practice of inclusion as it related to different disabilities, understanding the factors which help build inclusive schools capable of responding to diverse needs, and comparing the effectiveness of separate special education and inclusive education (Jenkinson).

The lack of documented information about the field of special education in Lebanon has compelled the authors to rely on informal observations and anecdotal reports. In describing the existing reality of special education practices in Lebanon, we can reveal that the educational private sector is the main provider of educational services for students with special needs (Ismail, 2004). Some private schools started building their own special units, typically referred to as the Learning Support Department, to teach students with special needs. Other schools use resource rooms as a main setting for providing specialized academic help for students with learning difficulties. A handful of private schools host children with special needs, placed by one of numerous nongovernmental organizations.

Although the Lebanese educational system has been updated to keep up with recent trends of technology, the component that involves exceptional students remains grossly overlooked. Policy makers have kept the educational titles “regular” and “special” independent of each other (New Hierarchy for Education in Lebanon, 1995). Arab countries like Jordan, Morocco, Tunisia, Saudi Arabia, Syria, Palestine, Egypt, Libya, and the United Arab Emirates have already taken the appropriate measures to restructure their educational system to combine the two educational systems into one by adopting the UNESCO project, Education for All (Yacoub, 2000). Therefore, Lebanon, in comparison to other Arab states, is not as competitive in adopting the principles of special education. With the social awakening concerning children with special needs, the academic integration of these children into regular schools became essential both for the person with a need and as a solution to a problematic situation.

Having acknowledged the seriousness of the problem at hand, what can we do to help solve this dilemma that is complex and multidimensional? In the authors’ view, we need to create a holistic approach *where educational leaders, parents, students, and stakeholders operate together to solve the problem*. We would like to propose an integrated framework of performance and well-being that unlocks parents, children, and staff potentials leading to a fundamental transformation of the school environment, its society, and its culture as a whole. This integrated framework is underpinned by psychological learning theory in a process that is progressive, brings adjustment, and is culturally attentive. It facilitates flexibility and variability in its application, to expand outside the walls of the school.

In setting the foundations of this framework, some basic steps have to be preformed:

(a) Developing a vision that tries to answer certain questions in order to help create an ideal school/community life; the first is “What do we believe inside ourselves that special needs children deserve in order to be healthy (physically, mentally, and socially) in our environment?” The second, “What would be the attitudes and behaviors of those who interact with these children when they have to apply the core convictions derived from the first question?” Thirdly, “What would be the behavior and attitude of the children and their peers when all the school community lives by these core convictions? Lastly, “Did we enumerate all the achieved standards and mastery level of performance and add or delete goals based on data collection?”

(b) Improving quality: Quality improvement occurs at three levels: competence, awareness, and management. At the level of competence, skills are planned at the personal, social, cultural, as well as professional. As for awareness, emphasis is at the level of self-awareness, compassion with the other, and awareness of cultural differences and performance. While at the level of management, stress is on teaching self-regulation, social skills, leadership, and continuous professional development. With the continued emphasis on school/community environment development, the integration of Maslow pyramid, Cognitive Behavior Therapy, and Social Ecology model can demonstrate success in helping these people change.

(c) Accentuating collaboration: As for collaboration, the focus is on students’ family, peers, staff, professionals, and stakeholders. In establishing the program of collaboration, we need to be cognizant of what really bothers each group if we are going to develop ways of genuine empathy and caring. We have to be aware about the issues and problems that make individuals anxious, such as lack of justice, equality, security, rights, equal opportunities, and survival. The framework emphasizes on the social ecological model as a form for collaboration where interaction in relationships has to be between the special needs child and the surrounding community. The model uses horizontal multilateral rather than vertical approaches to service delivery through creative use of volunteers, paraprofessionals, peer support, and social networks, in addition to professional services. Training at the level of collaboration provides services in the domains typically classified under the heading of “social support.”

The link that has to be established between the aforementioned three parts will create a difference in the lives of the students and the whole community. Such integration will embrace the physical, intellectual, emotional, and social growth of children without forgetting the traditional values of the society and thus having good productive citizens. The practical guidelines that will introduce social justice to educational programs and community can be grouped into four categories: vision that works towards restructuring curricula and teaching techniques to include culture, life experience, learning styles of the community, and history dialogue; quality improvement in terms of teachers' empowerment and administrators' leadership; associated with parental and peers' collaboration; and sustainability in terms of implementation of governance, accountability, and abiding by legislations around the world. If applied well and designed to suit specific school's culture and accommodated to the age and background of students, then these programs can be effective.

Vision

It would be to start with a definition of disability: it is a complex phenomenon that reflects an interaction between features of a person's body and features of the society in which he or she lives. The International Classification of Functioning (ICF) defines disability as an umbrella term for impairments, activity limitations, and participation restrictions. Disability is the interaction between individuals with a health condition (e.g., cerebral palsy, Down syndrome, and depression) and personal and environmental factors (e.g., negative attitudes, inaccessible transportation and public buildings, and limited social supports).

A child with disability may suffer from mental retardation, hearing impairments (including deafness), speech or language impairments, visual impairments (including blindness), serious emotional disturbance (referred to in this title as "emotional disturbance"), orthopedic impairments, autism, traumatic brain injury, other health impairments, or specific learning disabilities (*IDEA, 2004, Sec. 602(3)).* So, people with disabilities have abilities that go unnoticed because society focuses excessively on their limitations and not enough on what they can do. In many ways, disability can merely be a point of view.

In addition, a disability is a "social construction," whereas impairment is not. As such, a person can be blind (a disability), but in the dark, a sighted person becomes handicapped and hence on equal footing with the blind person. Not every inability is a disability because a "disability is an inability to do something that most people, with typical maturation, opportunity, or instruction, can do "(Kauffman & Hallahan, 2005, p. 30). As such, a person's inability to read is not disabled if he or she was not exposed to reading instruction.

Most persons have not directly encountered people with disabilities and the challenges they face. Accordingly, they may not appreciate the extent to which people with disabilities and their families are excluded, impoverished, and marginalized within a vicious poverty disability cycle. Persons with disability remain invisible and isolated because of stigma, discrimination, myths, misconceptions, and ignorance. Only by a thorough analysis of this experience and input from people with disabilities can society build a sound understanding and development of a strategy to address the needs and aspirations of disabled groups.

Based on what was mentioned, the development of a vision will be mandatory. This vision has to replace the archaic relationship existing between school administration, parents, and children by an active performance-driven development. Bainbridge (2007) describes the importance of a vision by stating that "… creating a vision… encourages thinking 'outside the box'. In order to do this you will need to undertake the process of 'visioning' in a safe and secure environment where new ideas are encouraged and possibly innovative ways of working are explored… (P3)" Following this particular definition, few questions need to be formulated in the quest to create a vision tailored towards an ideal school/community life. The first is "What do we believe inside ourselves the special needs children deserve in order to be healthy (physically, mentally, and socially) in our environment?" The second, "What would be the attitudes and behaviors of those who interact with these children when they have to apply the core convictions derived from the first question?" Thirdly, "What would be the behavior and attitude of the children and their peers when all the school community lives by these core convictions? Lastly, "Did we enumerate all the achieved standards and mastery level of performance or add or delete goals based on data collection?" This vision seems utopic and unrealistic unless the last question is answered where vision is put into action.

The answer to the first question, "What do we believe inside ourselves the special needs children deserve in order to be healthy (physically, mentally, and socially) in our environment?", could be reflected through a system of shared values that if applied it will facilitate the whole life of the children, their peers, and caregivers not in the school community only but outside it. These values are intended to guide everyone who interacts with special needs children and assist them to become independent, healthy, and safe. It is the view of the authors that these values can be represented through powerful key terms derived from literature that provide direction and reflect social justice. The core values are acknowledgement, diversity, intra-/interpersonal relationships, needs, equity, and sustainability. Thus we coined the acronym *ADINES* that has to be integrated into all levels and functions of the school organization:

A = Acknowledgement Recognition of another's existence, validity, authority, or right.

D = Diversity To recognize and appreciate diverse characteristics that make every person unique in an atmosphere that promotes individual and collective achievement.

I = Intra-/interpersonal relationship *Intra:* To have the kind of life that a person wants as related to private effects, personal growth, and spiritual/moral. *Inter:* The important relationships that exist between individuals.

N = Needs The needs are a motivating force that compels action for its satisfaction. They range from basic survival needs satisfied by necessities to cultural, intellectual, and social needs satisfied by necessaries.

E = Equity Equal treatment of people with disabilities through development of legislation to provide protection from discrimination and implementation of a policy to combat discrimination and promote equality.

S = *Sustainability* It is intended to be a means of configuring civilization and human activity so that society and its members are able to meet their needs and express their greatest potential in the present, while preserving biodiversity and natural ecosystems and planning and acting for the ability to maintain these ideals indefinitely.

Thus, it is necessary to remove attitudinal barriers and strive for further integration of people with disabilities, and by this it will help to remove the biggest danger in society which is people's ignorance in dealing with learning disabilities. Intellectually disabled people are not mentally ill or contagious. While they may not be totally independent, they can learn to do simple household chores or attend to their self-care needs. The intellectually disabled can take part in all activities if people allow them to. Some learn vocational skills and can even become part of the work force. It is merely a question of proper job matching and job training. Intellectually disabled people have emotional needs just like other people.

Another point that has to be looked at in establishing the vision is inclusive education. The Salamanca Statement passed by UNESCO (Ainscow, 1994) fully advocates the practice of inclusive education for students with disabilities with the caution that "while inclusive schools provide a favorable setting for achieving equal opportunity and full participation, their success requires a concerted effort, not only by teachers and school staff, but also by peers, parents, families and volunteers" (p. 11). Thus, the pendulum for special educators worldwide has swung towards a position of inclusion, rather than segregation or exclusion, where inclusion refers to the full-time integration with appropriate accommodations and supports of students with disabilities in general education classrooms located in their neighborhood schools (Bartolo, 2003).

Educational values such as "freedom," "equality," "justice," "personal autonomy," "self-realization," and "the growth of understanding" that are often discussed in the context of inclusive education are notoriously vague and cannot translate into concrete quantifiable indicators of educational outcomes. They are rather qualities that can be achieved through proper interaction with students in learning situations and "not extrinsic products of these interactions" (O'Hanlon, 2003). Inclusive education has had tremendous impact on philosophy, values, and practice of entire educational systems worldwide and is often based on ideals of social justice (Artiles, Harris-Murri, & Rostenberg, in Inclusion & Diversity in Education, 2009).

For inclusive education to attain freedom, equality, and justice and foster autonomous learning depends largely on the nature of the conditions for learning set forth by the teacher, rather than its products. "Therefore, teaching is seen as an ethical activity, and an appropriate focus for practical investigation and reflection. All areas of education and schooling are open to scrutiny in the advancement of such values and concepts within inclusive practice through research processes like action research. However, it is argued that, within a discourse of ethics, 'maintaining segregated special education is incompatible with the establishment of an equitable education system and hence, ultimately with an equitable society. It follows therefore that only inclusive education can deliver social justice' (Dyson, 1999)."

Quality Improvement

Teachers Empowerment

The answer to the second question of our vision, “What would be the attitudes and behaviors of those who interact with the special needs children when they have to apply the core convictions derived from the first question?”, will be through training the whole constituents of the school, to build a good quality of life for these children in and out of school; there is a pressing need to build capacities and develop the skills of its constituents who have to practice and teach these skills, in other words, teachers, staff, caregivers, mental health staff, and stakeholders. The biggest challenge lies in the transition from an archaic system of interaction with special needs children to a system of various roles and wide variety of tasks that offers a cooperative and comprehensive program in managing the situation in inclusive schools. With continuous emphasis on school environment development, integration of Maslow pyramid and development of Cognitive Behavior Coping skills and Social Ecology model can demonstrate success and induce positive change.

In Lebanese schools, teachers have to follow a limited agenda in teaching and giving information, and they value students’ success by this set agenda. They are disregarding a human value, a personal ability to contribute to society. They devalue the students’ capacity to do and to be. But psychological evidence shows that if educators infuse teaching activities with value, dignity, and respect of the learner, the learners will be ready to do and contribute to the utmost of their ability (Rogers, 1983).

When teachers follow the limited, short-term goals of the educational programs set by the government ministers, they are narrowing the concept of education and disabling student to be value-laden human being. This situation has lead the researchers to ask what contribution might the skills of special needs helper make to increase the levels of dignity with which people in the Lebanese schools are treated.

Although they may lack the professional training of special needs helper, school teachers have a long tradition of helping students with disability problems. They also interact daily with the students and thus are in an excellent position to provide personal direction. In fact, effective teachers share many of the same traits as effective helpers: ability to empathize with students, patience and flexibility, excellent interpersonal skills, openness to new ideas, and awareness of individual differences. Good teachers also habitually promote and sustain positive group interaction in their classes and develop a helping relationship with both students and parents. In all these ways, the elementary school teachers, who work closely with young children in a single classroom, generally might have the idea that developmental guidance is an integral part of their responsibility to students (Ismail, 2004).

As National Disability Authority (NDA) summed it up, understanding social constructions of disability and impairment can help to explain why people with disabilities have been marginalized. Contact with people with disabilities under particular conditions can reduce prejudice. Also, affective ties including forming close friendships appear to be very effective in reducing prejudice. Further, disability awareness training is required for all but how it is carried out is important. The impact of disability awareness training should be evaluated. Media may play a larger role in determining attitudes and knowledge than otherwise, and in these circumstances, the need for an enlightened, responsible, and nondiscriminatory media culture becomes more important. Finally, understanding and promoting the values underpinning basic human rights or the basic human conditions required for development—equality, autonomy, dignity and solidarity/social justice—is essential if governments and individuals are to commit themselves to ensuring that each and every person can access the conditions required to live as self-determining individuals (Hannon, 2010).

The 58th World Health Assembly has adopted a resolution aimed at improving the daily lives of people with disabilities. It calls on WHO and its Member States to work towards ensuring equal opportunities and promoting the rights and dignity of people with disabilities, especially those who are poor.

In Jordan, His Majesty's initiative and instructions have resulted in a new Jordanian strategy paying particular attention to issues central to the lives of citizens, including the rights of persons with disabilities, by developing a National Disability Strategy. In the area of accessible communication and environment, the National Strategy calls for accessibility in all forms including social and behavioral attitudes and stereotypes, through a series of interventions and programs, to simplify and facilitate the movement of persons with disabilities on an equal basis with others, by altering transportation, information, and communication technologies and all other public service facilities which will result in self-reliance and social integration for persons with disabilities.

In the target area of media and awareness raising, the document calls for effecting a change in Jordanian society, leading to a reduction in the incidence of disability and to the restructuring of the physical and social environment, enabling persons with disabilities to achieve their rights and improve their image in society.

The National Strategy aims at ensuring equalization of opportunities for persons with disabilities with the aim of leading lives with dignity, including accommodation and sustainable care services aimed at all types of disabilities, especially for those with medium and severe intellectual disabilities, and to ensure equalization of opportunities for persons with disabilities on an equal basis with others.

In the field of sport, recreation, and culture, the strategy seeks to enhance the physical, psychological, social, and cultural well-being of persons with disabilities and to build their confidence in themselves and in their abilities, as well as helping them regain motor and other skills through sports and cultural activities. These factors play a significant role in the development of physical capabilities as well as their impact on the development of adaptive behavior and social maturity of individuals with disabilities.

Regardless of what was issued or what was planned, quality improvement in schools occurs when people use their abilities to the maximum.

A first step that has to be done is to improve the well-being of teachers by improving their attitudes towards themselves and towards others. They need psychological support for their own self-esteem and well-being; they need help in understanding and coping with the stressful situations they are experiencing as well as the demands of the position.

Second, the role of the teacher has to be changed from a dispenser of information to a facilitator, a skilled helper, communicator, and a certain extent therapist. Here the role of training becomes important due to the difficulty in changing adult attitudes and behavior. Without training to tackle teachers' own behavior, there is the danger that the adults' words will not match their actions.

A third thing that should happen is empowering teachers, because teachers can influence students' affective, behavioral, and intellectual abilities if they are empowered. By empowerment we mean how to make the transition from a traditional system of teaching to a system of various roles and wide variety of tasks to offer a cooperative and comprehensive program in psychosocial support and justice as an equal partner with educational programs. There is evidence (Norcross & Grencavage, 1989; Sizer, 1992) that human beings perform better; will learn more effectively, when they perceive themselves as possessed of inviolable dignity and worthy of unconditional respect and when they share in decision making; and have a certain level of control. What we have to do is to help teachers develop inner justice, peace with their own self, with no inner conflict. If this is achieved, then social justice will prevail, and thus we will experience harmony in human relationships, social justice, friendship, unity, cooperation and collaboration, and community development.

Authors contend that teachers should be trained in the basic skills of psychosocial support, teaching diversity, communication skills, critical thinking, and others. When teachers are trained on these basic skills, they will be able to help learning disabled students cope with particular challenge in some cases. But, they need to have the opportunity to internalize these concepts and skills themselves before they can develop these skills and attitudes in these students. By applying this, the teacher will be using the first key to social justice education: a helping and healing relationship. In addition, when we stress the importance of acquiring these skills, we are not devaluing teaching and academic skills nor disregarding the value of knowledge that the teacher has, but we are trying to show that deficiency in interpersonal and intrapersonal skills has a negative effect on teaching and learning (Blase & Blase, 2001; Keiser & Shen, 2000).

Teachers also receive important benefits from teaching in an ILFE (Toolkit for Creating Inclusive, Learning-Friendly Environments, 2006). They have more opportunities to learn new ways to teach different kinds of students. They gain new knowledge, such as the different ways children learn and can be taught. While looking for ways to overcome challenges, they can develop more positive attitudes and approaches towards people, children, and situations. Teaching becomes a joy, not a chore. Teachers also have greater opportunities to explore new ideas by communicating more often with others from within and outside their school, such as in school clusters or teacher networks, or with parents and community members. By applying these new ideas, teachers can encourage their students to be more interested, more creative, and more attentive. As a result, the children and even their parents can give teachers more positive feedback. They also can receive increased support from the community and be rewarded for the good work they are doing.

Teachers can experience greater job satisfaction and a higher sense of accomplishment when ALL children are succeeding in school to the best of their abilities. Remember, however, that "ALL children succeeding" does not necessarily mean that all children successfully pass a written examination. It means accepting diversity in the different ways children learn as well as how they show their success in learning, for instance, when they can successfully explain and apply a concept to the teacher or to the class, instead of answering questions about it on an examination.

In schools that are inclusive and learning friendly, teachers may have more volunteers working in their classrooms, which reduce the teaching workload. Under the teacher's guidance, these volunteers will more likely want to help when they understand how what is learned in the classroom is important for the lives of children and their families

Increased professional development opportunities are also needed to create a more dynamic and peaceful workplace. In this situation administrators and principals should encourage teachers in creating their own professional development opportunities. They have to be aware of their needs in relation to the vision and mission of the school. Another way to improve professional development is to recognize that teachers have different needs. Teachers vary in their learning styles and their desires and needs also differ. Teachers have to be given options to decide what kind and type of professional growth, training, and career goals (Robinson, 1994).

The working conditions of teachers will improve dramatically. Instead of working in isolated settings with few resources, teachers will have time to collaborate with one another. The ideas of teachers will be highly valued, and they will be viewed as leaders who work collegially with school administrators to design the best learning environments for students. There will be a place that creates winners, not winners and losers (Kottler, 1998).

Rejecting teachers cause disabled students to perform more poorly, both socially and academically. The self-concept of a rejected student can be affected. Simply including students with disabilities in the regular classroom does not guarantee their social acceptance or their acquit ions of improved social skills. Teachers must participate in developing and implementing a systematic program designed to improve the students' social skills and to increase their social integration (Marshall & Oliva, 2006).

Teachers should start by changing their attitude as their attitude has a significant effect on the attitudes of the students within the class; negative feelings towards students with disabilities can be communicated by the teacher. Teachers should attempt to convey a positive attitude that encourages acceptance of the student with special needs (Turnbull & Shulz, 1979).

Teachers should focus on students' similarities. Turnbull and Shulz (1979) state, "A difference is only a difference when it makes a difference…[C]hildren [with disabilities] has far more similarities than differences with the children without disabilities" (p. 48).

Because of the strong relationship between attitude and information, teachers should be sure they have adequate knowledge about students with disabilities and the appropriateness of different educational interventions. They should assume primary ownership and accept responsibility for the education of students with disabilities, just as they do for all students on the class list; provide families with documented evidence of their children's progress and successes; help families become more actively involved in their children's education; help families determined where a student's interests lie so that appropriate long-term goals can be established; teach and reinforce social skills that are needed for students to be successful, contributing members of the communities in which families live; tell families when their children exhibit inappropriate behavior or academic needs in the classroom; provide important educational and community data to help families stay current and knowledgeable about opportunities available for children; and lend a helping hand, a supportive ear, and a friendly face to all families served (Hattie, 2002).

Another important figures that play a role in creating and developing social justice for special needs children is the principal and stakeholders. If they are supportive, involved, and engaged in what is happening, all the positive powers of students, teachers' assistants, and counselors will be unleashed to their fullest. In this situation, they will be facilitators and managers at the same time. Trust and rapport must be established through open communication with students, parents, and teachers. By maintaining a positive attitude and viewing all members of the school and community as assets, then culture of social justice will prevail (Bentley, 2000; Harris & Enfield, 2003).

Children's mental health, social, and emotional development should not be the responsibility and goal of teachers only, but every active member within the school community. All staff should be trained in the basic skills of observing and discovering the beginning of health and mental symptoms, dealing with diversity and communication skills (McGuiness, 1993). When staff is trained on these basic skills of rights, equality, and diversity, they will be empowered to help special needs children cope with their particular situation.

To alleviate problems and enhance and develop awareness, a map of how to improve performance will be based on training that tackles the health, personal, professional, and social factors of the people in the school. The most feasible way seen by the authors could be through practical and applied workshops and activities like but not limited to (Hallahan, Kauffman, & Pullen, 2009; ILFE, 2006):

- Development of students profile.
- Offer trainees simulation of situations that occur on job, and make them practice ways of how to cope with these situations.
- Offer sessions in human rights, justice, peace education. and conflict transformation.
- Organize events designed to improve teachers and staff motivation and analyze successful actions in dealing with health and disability problems.
- Offer activities related to relaxation training, stress booster training, and cognitive structuring.

In addition to training and workshops, certain activities and incentives have to be promoted such as:

- Updated information for teachers and parents as related to the nature of the job and their children's development.
- Offer social activities for teachers and children's family in the school vicinity to understand the nature of work handled.
- Opening a unit of stress management and physical training. The focus of the unit's activities will be on both individual and organizational levels, not forgetting the promotion of the awareness for children's right and justice workshops.
- Promotion criteria and salary improvement plays a role in creating a positive atmosphere.

Administrators' Leadership

Within a task, there are many activities, which only the leader can perform. However, there are often opportunities for leaders to delegate parts of the task to colleagues. Delegation should not be undertaken in order to off-load boring, tedious, unrewarding tasks, but to empower and enhance job satisfaction and reward (Bennett, 1994; Praisner, 2003).

Kottler and McEwan (1998) suggest that when a principal chooses to accept the leader role, he/she has to develop as a skilled helper. This skill will involve mastering a number of counseling and consulting skills. The acquisition of these skills will allow the principal to gain access to the mind of the people whom he/she is interacting with, earn their trust, and understand what they are experiencing. In return, the people will listen to him/her because he/she has credible helping skills and an authentic interest in their benefit.

As a leader in his or her school, the principal has to be aware of the needs of students and ensure that teachers create an encouraging atmosphere for education. Hazler (1998) emphasizes the importance of the climate of respect and caring that engenders effective teaching and learning. Hazler contends that if the principal is supportive, involved, and engaged in what is happening, all the positive powers of students, teachers' assistants, and counselors will be unleashed to their fullest. In this situation, the principal will be a facilitator and a manager at the same time.

The climate of the school and the leadership of the principal in the school play significant roles in creating a positive environment that can affect the students' behavior and subsequent learning. The principal is one of the most important people in the school; the leadership provided by the principal determines whether a maximum opportunity for developmental task mastery by the students in the school is promoted.

Administration support is *vital t*o the intervention and its sustainability. They can give a hand in identifying specific dilemmas that represent the current culture of the school. Administrators and supervisors should undergo training that has to do with awareness, accepting diversity, human rights, etc. If teachers and staffs see their administrators and supervisors attending the training, they will acknowledge that this is important and their own participation is necessary.

How can we create a just, accepting society, and fair treatment for special needs children? This is where the third level of improving quality comes: management. An implementation of a comprehensive prevention program, which is characterized by a number of cognitive, behavioral, and social activities that form the basis for understanding the best practices, will be needed.

At the level of cognitive activities the teacher should be able to (Hunter et al., 2005; Mastropieri & Scruggs, 2007:

- Assess the nature and type of skill deficits in every child.
- Increase the child's ability to cope with high-risk situations including both interpersonal difficulties and intrapersonal discomfort.
- Be able to use active behavioral or cognitive coping methods to deal with problems.
- Through simulation, teachers will develop the skill of self-efficacy and be persuaded by the possibility of change.
- Teach coping behavior through instruction, modeling, directed practice, and feedback.
- Involvement and engagement of the significant other of the child (parents, peers, etc.) in attending training sessions.
- Elicit from the significant other and the child some important positive aspects and explore how they can work together to overcome the problem.

Behavioral and Social Activities

Physical activity constitutes an important factor in promoting resilience and mental health in the children. In fact, physically active people tend to have better mental health than their inactive counterparts. The physically active usually score better in regards to positive self-concept and self-esteem. Physical activity has also been used to treat mental health problems such as depression (American Heart Association, 2009).

Practical ways of enhancing resilience include but are not limited to:

- Access to sports and other activities that suit the situation of every child.
- Opportunities to participate in arts.
- Practice in social skills.
- Opportunities to practice enjoyable and fulfilling use of time, for example, involvement in the theatre, arts, music, drama, or exercise.
- Opportunities for socially useful activity, for example, through peer support or community involvement.
- Opportunities to benefit from education and obtain qualifications.

Collaboration

Thirdly, “What would be the behavior and attitude of the children and their peers when all the school community lives by these core convictions?” This question can be attained by collaboration between teachers, mental health professionals, students’ family, and stakeholders. Collaboration can be grouped into shared core values and respect, proper training, and continued cooperation. Each level depends on and potentiates the other.

Maslow’s theory of self-actualization maintains that there is a hierarchy of needs, ascending from the basic biological needs to the more complex psychological motivations that become important only after the basic needs have been satisfied, namely, physiological needs, safety needs, belongingness and love needs, esteem needs, cognitive needs, aesthetic needs, and self-actualization needs.

The needs at one level must be at least partially satisfied before those at the next level become important determiners of action. When food and safety are difficult to obtain, the satisfaction of those needs will dominate a person’s actions and higher motives are of little.

Most individuals with special needs continue to struggle to fulfill the first four needs as many are poverty stricken in developing countries. Those who are luckier and live in more prosperous and supportive societies cannot claim to have achieved esteem needs, in other words, to achieve, be competent, and gain approval and recognition (Atkinson & Hilgard, 2003; Walker, 2003). Chief among the traits that set self-actualizers part from other individuals are (1) the ability to accept themselves and others for what they are and (2) to show concern for the welfare of humanity. We believe that that social justice embodies these two distinguishing characteristics. Using Maslow’s nomenclature, when a particular nation has peak experiences in the form of “temporary, nonstriving, nonself-centered state of perfection and goal attainment” (p. 467), albeit at different intensities and in various contexts such as appreciation of and intimate relationship with others, it follows that the journey towards social justice has begun, ending with wholeness, perfection, aliveness, uniqueness, effortlessness, self-sufficiency, and the values of beauty, goodness, and truth.

Parental Collaboration

To have social justice implemented in a holistic way, parents have to share in creating this atmosphere. Most parents in Lebanese families show caring about what happens to their children. Many parents want a third party, usually the school, to guide them through this arduous process. It is the view of the authors that teachers should spend a significant amount of their time working with the caregivers by encouraging them to appreciate the value of their own social action efforts.

An ILFE can offer many benefits to the community in the view of the authors. The community develops a sense of pride as more children go to school and learn.

They discover that more “community leaders of the future” are being prepared to participate actively in society. The community sees that potential social problems such as petty crimes or adolescents’ problems may be reduced. Community members become more involved in the school, creating better relations between the school and the community.

Lebanese schools have to do certain steps to establish partnership with parents and the community to share their convictions with young people, to nurture and inspire hope, compassion, and commitment in the family and larger community. Thus, the authors have some suggestions; if implemented it will lead to involvement that is more parental in social justice. We suggest the following ideas:

- Assessing parents’ commitment to social justice issues.
- Learning and teaching ways how families can participate together in projects that contribute to the greater societal good.
- Appreciating the important role that parents play in the development of children’s social conscience.
- Help parents build a community of learners who respect and value personal uniqueness, choices, and differences and who promote mutual understanding and inclusion through workshops, activities, and parental meetings.
- To further demonstrate this commitment to diversity and social justice, the authors believe that schools have to offer dialogues on societal issues, sustainability, and classes on subjects such as peace and conflict, gender, feminist, and much more.
- Finding out about the social justice needs of parents and communities to help children overcome their problems, this can be reached by asking parents during conferences or by making interviews and surveys to learn about the activities that parents are interested in and the nature of assistance that the parents want or that they can offer to the school as social backup.

Implementing these, strategies will take time and might be frustrating when response from parents in the beginning of the implementation of the suggested ideas might not be up to the intended goals. In this situation, creative ways and insistence on cooperation in a positive and gradual way will lead to a change. The more parents become interested in the school’s activities, the more effectively they will be helping the school, the more they will ask from schools, and the more positive effect will be reflected on the behavior of their children (ElZein, 2009). This might be troublesome in the beginning, but this is what is needed for social justice.

Peers’ Collaboration

Students with special needs may encounter difficulty in social interactions with general education because of their behavior, fail to conform to the expectations of school and society, may not look or act the same as other students, can be easily identified, have their appearance or their actions visibly different, are delayed in social development, often encounter failure, and lack the necessary language skills for effective communication.

Successful inclusion depends on three factors: attitude, resources, and curricula (Favazza, Phillipsen, & Kumar, 2000). Hence placement alone does not guarantee acceptance, social integration, and social justice. What is needed are multiple opportunities for children without disabilities to interact with special needs children, especially when they are supported and encouraged to do so. In their research, when participants (kindergartners) played directly with peers with disabilities, they reported increased levels of acceptance, began to incorporate children with disabilities in their drawings, stop by the classes of children with disabilities, and greet one another in the hallways, cafeteria, and playground.

Peers should provide support and assistance (assisting students with physical or visual impairments in their travels around school or providing a student with severe disabilities the opportunity to learn and practice age-appropriate skills while participating in games or verbal interactions with others) (Reay, 2006).

Peers can become peer tutor to help them with instruction and the model provided by the general education tutor. Tutoring is effective with students who are withdrawn and have acting-out behaviors and those with academic needs.

Through an ILFE, children become more self-confident and develop greater self-esteem. They take pride in themselves and their achievements. They learn how to learn independently both inside and outside of school. For example, they can learn how to ask good questions. They learn to understand and apply what they learn in school to their everyday lives, such as in their play and in their home. They also learn to interact actively and happily with their classmates and teachers. They learn to enjoy being with others who are different from themselves, including how to be sensitive to and adapt to these differences. All children learn together and value their relationships, no matter what their backgrounds or abilities. Children also become more creative, and this improves how well they learn. They learn to value their native language, to appreciate their cultural traditions, and to consider themselves as also being different from others, which is normal and something to respect and to celebrate. Through an ILFE, children improve their communication skills and are better prepared for life. Children gain—or can regain—self-respect for themselves as they learn to respect others.

In addition to parent, peer, and family involvement, collaboration must occur internally (within the school) and externally (outside the vicinity of the school). Within the school, it is the responsibility of the leaders to build collaboration. If collaboration and collegiality are missing within schools, we cannot build collaboration with business, political bodies, universities, or organizations (Vincent, 2003).

In establishing collaboration, we need to be cognizant of what really bothers each group if we are going to develop ways of genuine empathy and caring. We have to be aware about the issues and problems that make individuals anxious, such as lack of justice, equality, security, rights, equal opportunities, and survival. The framework emphasizes on the social ecological model as a form for collaboration where interaction in relationships has to be between the children and the surrounding community. The model uses horizontal multilateral rather than vertical approaches to service delivery through creative use of volunteers, paraprofessionals, peer support, and social networks, in addition to professional services. Training at the level of collaboration provides services in the domains typically classified under the heading of "social support," including (Hiatt-Michael, 2001; Jazzar & Algozzine, 2007):

(a) Creating awareness as related to special needs problems
(b) Developing skills that have to do with support such as:

  - Readiness to offer help upon observing personal risk or health problems.
  - Recognize some of the signs of injustice and discrimination, health, and mental health illness.
  - Emphasize on personal responsibility for working towards change.
  - Use appropriate flexibility in managing children's disabilities.
  - Facilitate self-efficacy and encourage optimism.
  - Show compassion without overruling the acquired skills.
  - Offer clear advice to change.

(c) Instrumental support (referrals, help centers, etc.)
(d) Networking between school and community to facilitate good resettlement and rehabilitation

For families to be healthier, they should be cohesive, that is, family members are free to act independently of other family members. Such families can offer a child with a disability the necessary support. It should not be overly cohesive as it becomes overprotective.

It should also be adaptable, that is, the degree to which families are able to change their modes of interaction when they encounter unusual or stressful situations. A family should be neither unstable nor rigid as it would become less effective in dealing with disability.

Another substantial collaborative work is the development of a board or committee that handles complaints and problems between the school community as a whole, the children, and their parents. This committee is responsible for handling problems and improving the school system, since an outside observer can handle any problem objectively.

In general the suggested horizontal cross-training can plant the seeds for the development of awareness, knowledge, and appreciation especially if all contributing members are receptive to the conveyed messages. The triangular relationship established between parents, teachers, staff, and stakeholders could be ultimate strategies to ensure social justice in school. A good knowledge of the network and a comprehensive health and social needs assessment plan allow for a correct orientation of children in school and in their community.

Through all forms of cooperation between parents, teachers, and peers, children become more self-confident and develop greater self-esteem. They take pride in themselves and their achievements. They learn how to learn independently both inside and outside of school. For example, they can learn how to ask good questions. They learn to understand and apply what they learn in school to their everyday lives, such as in their play and in their home. They also learn to interact actively and happily with their classmates and teachers. They learn to enjoy being with others who are different from themselves, including how to be sensitive to and adapt to these differences. All children learn together and value their relationships, no matter what their backgrounds or abilities. Children also become more creative, and this improves how well they learn. They learn to value their native language, to appreciate their cultural traditions, and to consider themselves as also being different from others, which is normal and something to respect and to celebrate. Through an ILFE, children improve their communication skills and are better prepared for life. Children gain—or can regain—self-respect for themselves as they learn to respect others.

Through collaboration, the community develops a sense of pride as more children go to school and learn. They discover that more "community leaders of the future" are being prepared to participate actively in society. The community sees that potential social problems, such as petty crimes or adolescent problems may be reduced. Community members become more involved in the school, creating better relations between the school and the community (Casanova, 1990; Hudson & Fradd, 1990).

When inclusion is implemented properly, which means involve and give training to the teachers, give the kids support in the integrated environment, involve general education and special education parents from the beginning, and make adjustments as the program is implemented, the whole school becomes a better place.

Sustainability

Fourth question asked in developing the framework for social justice was the evaluation of the achieved standards and mastery level of performance: "Did we enumerate all the achieved standards and mastery level of performance and add or delete goals based on data collection?" The authors consider four steps to be followed in order to answer this question: implementation of governance, accountability, and order, abiding by legislations around the world that stipulate information about dealing with disabled children and their rights, enhancing partnership with educational organizations and the children's community, and exchanging practices. The success in delivering all the services needed demands dedicated and well-trained teachers, but they in their turn need support and recognition from the administrators. The more this positive environment is maintained, the clearer the emotional resilience among children is observed.

Research shows that many mistakes were major with the rush to implement massive inclusion programs in the United States. Some of these mistakes include inadequate preparation of mainstreaming participants (regular education teachers, special education teachers, parents, etc.), misunderstanding of the principle of Least Restrictive Environment which presupposed a continuum of services as full inclusion, inappropriate selection of students for full-time mainstreaming, insufficient support to inclusion students and general education teachers, and inadequate communication among team members (Lewis & Doorlag, 2009).

Moreover, research on inclusion showed mixed results that have to do to the effectiveness of inclusion programs. There were several examples of successful programs that showed more gains in self-contained classrooms than the resource room for mildly handicapped students, whereas placement in the regular classroom with a combination of carefully designed individualized instruction and resource support was more effective for students with mild learning disabilities (Lewis and Doorlag 2009; Smith & Tyler, 2010).

Generally, inclusion yielded positive outcomes for students with severe disabilities in terms of social relationships and friendships, acquisition of communication skills as part of their participation in cooperative learning activities, and generally tended to receive more academic instruction, one-to-one instruction, and more teacher attention than their peers in self-contained classroom.

Research concluded that the instructional factors that promote achievement of students with disabilities include:

- Small class size
- Consistency between curricular goals and instructional activities
- Mastery learning and a formal management system
- Increased time for cognitive activities
- Increased instructional time
  (Lewis & Doorlag, p. 435)

A quantitative study in Kuwait (Al-shammari & Yawkey, 2007) concluded that teachers were supportive of autistic students and their education because of their learning potentials compared to students with other disabilities, and attributed this finding to parental involvement in programs related to their children's needs. Recommendations of this study included additional training for special education teachers which may influence attitudes towards teaching and accepting students with special needs. Another recommendation was the awareness of and need for parent involvement of families with their special needs children.

Furthermore, there is research evidence that the family attitude contributes to the prognosis. Family stresses associated with limited financial resources, lack of appropriate services, and insufficient support systems are examples of family system risk factors that can contribute to poor prognosis. Environmental risk factors such as lack of services and negative attitudes can also have an adverse influence on the prognosis of the child with disability (Gupta, Kar, & Thapa, 2006).

In India, disability is still largely viewed in terms of a "tragedy" with a "better dead than disabled" approach, the idea being that it is not possible for disabled people to be happy or enjoy a good quality of life. Dalal and Pandey (1999) and Gupta and Singhal (2004) investigated cultural beliefs and attitudes of a rural Indian community towards physical disability. The results revealed fatalistic attitudes and external dependence in families with disabled children.

Though it cannot be disputed that parents of disabled children face a great deal of stress, it is now important to move away from describing these stressors and their adverse effects. Instead, research should now focus on exploring the ways that such families cope with varying degrees of success.

Not forgetting the reported results that families with a child with disabilities can and in fact do have positive perceptions which lead to better quality of life for the family and scope for maximizing the child's potential. Though precipitated by a specific event, formation of positive perceptions is usually a process, which can occur simultaneously on a long time after the event. This leads to three main implications. Firstly, given this framework, the situation calls out for more extensive exploration. Second, it is imperative to look at the tools being used and whether they provide space and opportunity to give positive responses. If we do not ask positive questions, we would rarely get a positive answer. Finally, helping families develop a positive outlook might be the serving points of intervention by the clinicians themselves. Although, the research in this area is limited as yet, there is a possibility of developing practical interventions to help families to adapt. Most often their intervention is done at the level of the child and addressing the disability per se. Therapists might want to concentrate on this aspect and facilitate families' coping processes by encouraging and supporting positive outlook on self and life. This can be executed through the course of family therapy, marital therapy, or individual counseling. A very effective way would be moderating self-help or support groups for parents with children with disabilities. Parents with positive perceptions can help the other parents in the early stages of adjustment develop positive but realistic expectations.

To support the sustainability of the social justice intervention, the Lebanese government needs to abide by the national and regional civil rights of the people with disabilities, legislation, and litigation and court decisions. Cooperation with community agencies is vital to secure continuity of treatment and to facilitate the mainstreaming of children into the school community. One important thing has to be added related to making changes in the children's way of life and situation. Changing the way of dealing with the learning disabled children requires some basic assumptions like taking a gradual approach, avoiding too ambitious a time span, recognizing reason for the changes that are made, and reconsidering workload.

Another factor that leads to sustainability of intervention program is to do continuous evaluation of the program in terms of:

- Respect of children's rights
- Application of the process of confidentiality
- Quality of care and consultation
- Reports of meetings between parents, professionals, and teachers
- Quality of the physical and social climate of the disabled child

Certainly, education and skills are key to opportunity, employability, and security. Yet, it takes more than personal attributes and resources to drive educational and life opportunities. Other factors such as where, how, and who the person with disability lives with can be of equal importance to one's personal resources. This is referred to by Putnam as "social capital" (1993) and is identified as the key to success in communities. This consists of the means to access "networks, norms and trust that facilitate co-ordination and co-operation for mutual benefit" (Putnam 1993), thereby making a healthy society where dignified life is possible (O'Hanlon, 2003).

Similarly, Dyson (1999) who distinguished between justification (rights and ethics, and efficacy) and implementation (political and pragmatic) of inclusive of special education has coined the term efficacy discourse and argues that students may socially benefit all students through well-implemented models. To do so, political actions are called for through addressing inequity among communities and abolishing ideas and assumptions that continue to feed segregated special systems (Artiles et al, 2006). He argued that social justice can be viewed as individualistic or communitarian. In the former, it focuses on access and distribution of resources; hence it is libertarian and merit based; in the latter, it emphasizes social cohesion, care, and responsibility.

Therefore, authors contend that public policies should give priority to the following concerns:

- Universal preschool education
- Basic skills for all children through literacy and numeracy targets in the National Curriculum
- High achievement for all young people through a unified qualifications system for 14- to 19-year-olds
- Training investment by employers
- The expansion of university education
- The development of lifelong learning opportunities

We believe that universal/inclusive design provides an environment that enables people with disabilities to move about freely and safely and to use its facilities and services without undue convenience and danger. The creation of universal access is a matter of design and standards rather than cost (Disability Brief, 2005).

In addition to what was mentioned, what can improve the Lebanese intervention program is the exchange of best practices from other countries under the condition of adopting experiences to suit cultural differences. This can be actualized through organized meetings, exchange of successful practices, development of management instruments and training materials, and supply of books, guides, and brochures.

Skills, knowledge, strategies, and cooperative community are the key elements for sustaining integrity, multiplicity, and social justice in educational organizations. Whether the individual is a teacher, administrator, parent, or student, there is a need for empowerment, guidance and counseling, support, and practice. This chapter was intended to offer a framework to help facilitate the important work of promoting equity and social justice for the benefit of the Lebanese community in general and the learning disabled children in special.

The Fifty-eighth World Health Assembly has adopted a resolution aimed at improving the daily lives of people with disabilities. It calls on WHO and its Member States to work towards ensuring equal opportunities and promoting the rights and dignity of people with disabilities, especially those who are poor. Countries are requested to strengthen national policies and programs on disability, including community-based rehabilitation services. WHO is requested to support these efforts and to collect more reliable data on all relevant aspects of disability, including the cost-effectiveness of interventions.

Conclusion

Lebanese children are the most valuable asset. They need us to provide support for their educational and emotional needs, taking into consideration the stresses and demands of school. As suggested, the first step to the development of a program is to build awareness of the situation, understand the degree of the problem, and identify the needs. To address these problems, a multifaceted framework has to be developed that deals with reestablishing safety and basic health needs and offers education and integration. These elements would provide the basis for all partners to move forward and put future plans by providing technical assistance for legal review, assessment, advocacy, fund raising, capacity building, investment projects, and monitoring and evaluation.

As teachers whose expertise is to understand the dynamics, challenges, and resources within the school environment and the cognitive, behavioral, and emotional functioning of children, the teacher plays a central role in supporting the educational and mental health needs of students. Legislators know this, educators know this, and the community recognizes and appreciates this. As key players, to them go to make the difference in whether or not revitalization efforts will be sustained or will fade away. Schools cannot act in a new way unless leadership prevails. In addition, restructuring will not happen unless there is external support from politicians and community. The most influential key players are teachers, who serve as primary motivators in helping students to grow to achieve. Parents must become active players in changing student attitudes. Students must assume responsibility for their own growth, learning, and achievement. Legislators interested in presenting social justice in schools should encourage the formation of a legislative study committee to determine the best ways to support social justice in Lebanon. In addition, professionals and educators who support such programs must become organized and active on the country level. The researchers suggest a 3- to 5-year start-up period as a sensible time frame to use when considering implementing social justice. This provides time for the universities to prepare qualified teachers and for administrators, educators, and parents to develop strong effective programs.

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Chapter 45
Education Policy in Cyprus: From Decision-Making to Implementation

Christina Hajisoteriou and Panayiotis Angelides

Introduction

Marshall and Gerstl-Pepin (2005) argue a point familiar to educational researchers within the field of policy sociology. Traditionally, policy analysis for social justice has taken place at the macro-level of the educational system while taking an interest in the objective measurement of justice-related phenomena. To this extent, the positivist, functionalist and pluralist assumptions have largely remained uncontested. Marshall and Gerstl-Pepin go on to explain that traditional policy analysis for social justice falls short in challenging the reliability of economics-based methods including cost-benefit or decision analysis. By relying on the assumption that policy for social justice can be studied in an analytical framework, the traditional view overlooks the sociocultural and value-laden character of education. However, education policies for social justice are the outcome of policy debates and conflicts over culture and values and 'result when certain cultural values win' (Marshall & Gerstl-Pepin: 65).

In sociopolitical arenas, the political actors' normative judgments, such as their values and interests, influence the problem definition, meaning the ways in which the social justice issue is labeled, defined and ranked on the policy agenda in order to be satisfied. The definition of the social justice issue turns into policy goals reinforcing either developmental or redistributive policies, meaning 'whether a policy is a small add-on or it takes from some to give to others' (Marshall & Gerstl-Pepin, 2005: 40). Nonetheless, Marshall and Gerstl-Pepin conclude that in order to disrupt inequity in education, not only political actors but also education leaders and educators across all the levels of the system should move from reproduction to reconstruction. They should challenge and disrupt the taken-for-granted assumptions, norms,

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policies, structures and practices that perpetuate inequity by challenging the legitimacy of the system in order to systematically deinstitutionalise inequity.

Thereafter, we contend that beyond the structures of policy and policy planning for social justice in education, it is necessary to look into the cultural processes of policy implementation. For many analysts, education policy for social justice is delimited to the macrostructures of the state-derived rules and directives and hence disconnected from the educational cultures and implementation realities while neglecting the role of human agency (i.e. Hoskins, 2008). However, a broader lens of policy investigation implies not only the examination of social justice policy enactments but also the examination of the intentions, actions and inactions of the educators that are involved in the policy process, both decision-making and implementation.

Our argument is lent weight by Ozga's (2000) conception of policy as a process of negotiation, cooperation and conflict between different groups and individuals inside and outside the official mechanisms of policy-making. Accordingly, it opposes the instrumental notions of policy that conceptualise education as a social institution and define policy as the product of the institution's operation. Such conceptualisation decouples policy from the context within which it has emerged and fails to consider policy as both product and process. We thus disregard a conception of policy as a linear process which signifies that once developed, policy is implemented as intended. Consequently, policy for social justice does not include fixed and unambiguous mandates that derive from a single level of the educational system. On the basis of Ozga's definition, we indicate that education policy for social justice is rather ambiguous and unstable and encompasses all parts of the education system.

On this point, Bogotch (2008) argues that in order for social justice to become a reality, we should take into consideration the critical reflections of educators, across all the levels of the education system, upon professional issues of teaching, learning and leadership. We would agree that:

> if we are to succeed in clarifying social justice issues and problems of contemporary educational leadership, it will happen only when educators, at all levels, fully embrace the intellectual, political, social, and ethical challenges they face in everyday life. (Bogotch, 2008: 11)

Nowadays, many educators develop their school agendas and organise their school practices according to what the centralised state institutions say that matters in their schools. Bogotch remarks that the process should rather occur vice versa; supranational, national and local agencies should acknowledge educators' concerns on leadership and pedagogy in their decision-making.

The evidence we will present here seems to indicate that policy processes for social justice do not consist only of official policy formation by the state. Arguably, policy can exist, but without the implementation and the monitoring of its implementation, policy may also be non-existent. The implementation stage of the policy process entails the reinforcement of a policy formally adopted by a governmental body into practice. Implementation may differ from the planned policy or its adoption, meaning the decision to employ this policy. That is, because ‘institutional leaders do not mechanically implement policy from the state, nor do those studying and working in educational institutions mechanically implement the policies of their institutional leaders’ (Bell & Stevenson, 2006: 9). Therefore in researching education policy for social justice, we should never take policy implementation for granted. Although the analysis of education policy for social justice stems from conceptualising the social justice issue within a particular sociopolitical context, it should also encompass the implementation of social justice policies in practice.

Conceptualising Social Justice Within the Political Theory

Notably, conceptions of social justice underpinning educational policy are not fixed, stable or uncontested across time, place and political context. Nonetheless, Lingard and Garrick (1997) in their trajectory study of social justice policy in Australian education identify three dominant traditions of social justice within the political theory: the liberal democratic, the liberal individualist, and the social democratic. The liberal-democratic tradition promulgates an activist role of the state which endorses a continuum of affirmative action and redistributive policies. Thereafter, ‘each person should have the most extensive personal liberty for all that primary social goods’, including education, and ‘should be distributed equally, unless unequal distribution benefits the least advantaged’ (Lingard & Garrick: 162). The liberal-individualist tradition (otherwise the market-individualist conception) instead of the distribution process focuses on the competition for the accumulation of social goods. The state plays a minimal role, just about to ensure fair competition. Lingard and Garrick criticise the first and second traditions as arbitrarily assuming that all individuals act in their own personal interest. On the other hand, the social-democratic tradition reinforces a more collectivist conception of society, pointing to a different relation between social justice and the market; the achievement of social justice necessitates state intervention within the market.

The different traditions of social justice policy attempt to conceptualise its goals and classifications. Nonetheless, in real-life situations these categories overlap and are always tentative. Although education policy provides for individual benefits, it should also emphasise the collective good by establishing relationships of equality and reciprocity within the context of a ‘truly civil society’ (Lingard & Garrick, 1997: 175). We argue for a collective equality perspective, which adheres to conceptions of active citizenship. The concept of active citizenship draws upon the idea of active participation by promoting the feeling of belongingness to a community. Participation in political processes alongside civic and cultural participation is an important aspect of active citizenship (Niessen, Yongmi, & Migration Policy Group, 2004). Education policies which are oriented towards active citizenship aim at enabling all children to play a full role in society. Education for all not only allows individuals to develop their personal potential but also promotes the development of democratic and participative societies.

The reconceptualisation of a 'truly civil society and collective well-being' brings together a politics of recognition and a politics of redistribution (Lingard & Garrick, 1997: 176). Thereafter, we would suggest that the prevailing political culture should shift from 'a process-based social justice orientation to a distributive outcome conception' (Opfer, 2006: 283). Therefore normative definitions of social justice should be rooted in the distribution of outcomes rather than the distribution of access. Social justice goes beyond access, rather than it questions a *politics of equal dignity* which is grounded in all students' equal treatment (Clay & George, 2000: 208).

Fraser (1997) explains that injustice has two facets, namely, socioeconomic and cultural or symbolic. Socioeconomic injustice is rooted in the political-economic structure of the society and refers to exploitation, economic marginalisation and deprivation. Cultural or symbolic injustice stems from social patterns of representation, interpretation and communication and points to cultural domination, non-recognition and disrespect. Fraser argues that redistribution is the remedy for socioeconomic injustice, which includes policies such as the redistribution of income, the reorganisation of the division of labour, democratic decision-making and/or the transformation of other political-economic structures. On the other hand, recognition is the remedy for cultural or symbolic injustice that involves policies such as 'upwardly revaluing disrespected identities and the cultural products of maligned groups' and 'recognising and positively valorising cultural diversity' (ibid: 17). Nonetheless, redistributive remedies presuppose recognition and vice versa. As economic disadvantage and cultural recognition are intertwined, Fraser concludes that 'justice today requires both redistribution and recognition' (ibid: 12).

Clay and George point out that a *politics of recognition* should inform education policies for social justice policies. If education policy is to recognise diversity, it should challenge power relations and promote social change. A *politics of redistribution* is reminiscent of Stone's (1997: 44) concept of *vertical equity* which indicates the 'unequal treatment of people in different ranks' in order to achieve the 'same' outcomes. Stone argues in favour of rank-based rather than group-based (re) distributions. She suggests that group divisions across society in terms of demographic characteristics, such as ethnicity, race, gender or religion, which are often perceived as identity characteristics, fail to visualise the actual experience of marginalisation, disadvantage or discrimination. Thereafter, (re)distribution according to group membership may disregard important individual characteristics. On the other hand, rank-based (re)distribution assigns people to groups on the basis of 'fairly fine-tuned individual measurements', including individual history, performance and achievement (Stone: 47). Stone suggests that rank-based (re)distribution should take the place of group-based (re)distribution in affirmative action policies. She goes on to explain that whether the same (re)distribution is perceived as equal or unequal, fair or unfair, depends upon a policy actor's (or a network's) point of view and by extension their social justice values.

Social Justice Values in Education Policy

Stone (1997) argues that social justice values play a key role in the development and implementation of public policies, in general, and educational policies, in particular. According to Stone, policy actors who operate across all the levels of the education system have a range of social, ethical and political values. Moving a step forward, Bell and Stevenson (2006: 63) propose that policy actors' values regarding social justice and their normative expectations from education are 'not wholly the product of deliberate rational calculation…but could vary culturally'. Drawing upon Bell and Stevenson, we suggest that through cultural and ideological struggles, actors construct their own assertions, interpretations and axioms of social justice in education. They are educated, persuaded and socialised through ideas to support or oppose certain values regarding social justice. Subsequently, their social justice values become 'the prism through which new policy proposals are filtered' (Bleich, 1998: 93).

We define values as assumptions describing both the current state of affairs and the desirable state of affairs that we want to achieve. Valuing all students equally in a context of cultural diversity is often compounded by diverse meanings and values of social justice. Stone (1997) maintains that values underpinning education policies offer a continuum between equity and efficiency. Finding the best 'mix' between equity and efficiency is often at the core of policy debates regarding social justice. Stone disapproves of a zero-sum relationship between equity and efficiency, arguing that education policies should sustain more equity without sacrificing efficiency. Similarly, Ainscow et al. (2006: 23) depict social justice values as bounded to 'equity, participation, community, compassion, respect for diversity, sustainability and entitlement'. On the other hand, they are critical of a standards agenda approach to education, which is primarily concerned with achievement and attainment scores. Still, they point to a social justice agenda that is 'no less concerned with achievements but with *all* the achievements of *all* children' (Ainscow et al.: 29). Policies for social justice should take into consideration teaching, learning and leadership and provide the necessary resources to support the active and sustained involvement of all.

It is noteworthy that values denote certain interests regarding how things should be. Different policy actors pursue different interests according to their sociocultural, economic and political expectations and their own definitions of social justice in education. Interests are formed on the basis of four key values that underpin education policy for social justice: educational, economic, social and institutions. Thus conflicts over interests become conflicts over values, which affect both the process and product of policy for social justice. On the basis of shared or competing interests, policy actors form social groupings that indicate coalitions or conflicts driven respectively by a sense of common or conflicting purpose. The subjective sense of shared interests drives policy actors' participation in collective action (or inaction) for social justice. Consequently, policy actors form different groups (coalitions) that vary according to the levels of power with which they are accredited. Within coalitions, power operates as a mechanism for subordination of the individual interests to the group interests. Group interest is more than the sum of the interests of the individual policy actors who belong to the group, rather than including things that are beneficial for the group as a group beyond the self-interest of its members.

Ball (2006) maintains that the perpetual interplay of relationships within and between interest groups is influenced by power, which operates through cooperation and loyalty. Policy actors' choice to enter a conflict over policy issues derives from the existence of a group or a network that shares the same interests and is willing to support the same 'version' of ideas regarding equality and social justice. Long-term cooperation creates strong linkages between the network members and, by extension, loyalty. Loyalty may have a counteractive effect; the interests of the network members are influenced by their groups or networks, while the members' loyalty to their group or network derives from the ability of that group or network to represent their interests. Yet members of enduring alliances may feel coerced into continuing their cooperation with their group or network by pursuing their group's or network's policy expectations regarding social justice. Coercion may also derive from the unequal power of those entering the cooperative endeavour. This may result in the subordination of the weaker side by the more powerful one. More powerful individuals, groups or networks may impose their own expectations on the less powerful for the development and implementation of education policies for social justice.

Nevertheless, we propose a concept of power that is not bounded to the notion of *coercion*, which emphasises the capacity of those with power to control the policy agenda and impose it on others. Bell and Stevenson (2006: 21) define *coercion* as 'bounded by rule-making processes with clear expectation that subordinates will implement the decisions of superiors – willingly or unwillingly'. On the other hand, we suggest that power derives and operates through *influence*, as opposed to *coercion*. *Influence* has a powerful impact on policy processes, as it allows for institutions and actors without authority over one another to affect policy processes regarding social justice. Furthermore, influence may be exercised through collectivities of actors (i.e. groups or networks) while also adhering to top-down and bottom-up patterns, as subordinates can potentially influence the decisions of their superiors in the hierarchy. For example, school actors, who are lower in the hierarchy, may not only further but also mutate, 'midgetise' (restrict the policy change) or abandon a policy developed by policy-makers, who are at the upper levels in the hierarchy. Bell and Stevenson conclude that school policies develop through the actions of the individual school actors, which in turn are constrained by their values of social justice. Accordingly, educational researchers should bring together both the development and implementation processes of policies for social justice.

Education Policy for Social Justice: From Policy Formulation to Implementation

Rizvi and Lingard (2010) contend that the development of the policy agenda and the production of the policy texts often seek to 'symbolically' reconcile competing interests and/or conflicts over values. Policies for social justice are thus represented as advocates of the public interest while they conceal whose values and/or interests they actually serve. We may argue that social justice policies are pictured as profound solutions to perceived problems of inequality in education. Nonetheless, policies through normative judgements about social justice in education impact not only the definition of the problem of inequality but also the solutions they provide to the discursively constructed problems. The normative action to provide resources in support of the dominant values and/or interests draws upon the perpetual interplay of power relations. More influential institutions, groups and individuals may impose their own expectations of policy formulation and implementation on the less powerful.

Additionally, the articulation of system-wide strategy is a necessary but not sufficient condition for the practice of social justice in schools. In real-life situations, many policies for social justice are never implemented or they are implemented poorly. On the other hand, Bell and Stevenson (2006: 13) argue that education policy for social justice 'derived from the wider socio-political discourse, is mediated through the formulation of a strategic direction in the national and regional context which, in turn, generate organizational processes within which schools are located'. Moving from policy development towards implementation, the social justice issue formation is shaped not only by the individual beliefs of the school actors but also by the broader political culture and the wider social context. On this basis, action or inaction by school actors on social justice issues depends on the interaction of the political culture and their individual beliefs and values. Thus, there is a reciprocal relationship between individual beliefs and social culture, which indicates that the political culture is bounded by the accumulation of individual beliefs. Simultaneously, shifts in individual beliefs about social justice may reflect changes in the political culture.

To this end, Ball (1997) argues that the implementation of policy cannot be examined in isolation from the policy trajectory. He suggests that research should not be located at a single level of analysis (i.e. the school or the classroom), but it should 'attempt to capture the dynamics of policy across and between levels' (ibid: 264). Therefore, Ball (1994) contends that policy trajectory studies map out the interpretations and compromises of policy for social justice across all the levels of the educational system. He goes on to explain that relational constraints and influences play an important role in policy-making and implementation (Ball, 2006). Such influences may derive from both the national and the supranational institutions (i.e. European Union). On this account, policy should be examined through a 'framework that extends beyond the national level' (Ball, 2006: 18).

According to Brooks (2008), policy researchers hold a genuine concern of just development and application of policies that seek to address systemic inequities. Brooks criticises such concern as it triggers an exclusive interest in measurement and objectivity in analysing justice. He therefore argues that the examination of 'indirect' and 'imprecise' measures may prove illuminating for justice-related phenomena, for example, willingness to pay and sacrifice. Brooks (2008: 8) contention is that 'the field might consider in taking a step backward in order to take several forward'. He admits that we should re-examine social justice in terms of multiple and overlapping spheres, such as the interrelationship between social and individual dynamics.

On a similar route, we propose that as policies for social justice are authoritative allocations of values, educational researchers should link the micro-politics of actors' agency and personal relations to a systemic analysis of power structures. To this end, policy analysis for social justice provides also an insight at 'the lowest level of implementation and backs up through the policy structure, examining the decisions that each level makes, the incentive structures that operate on the targets of the policy, and bargaining relationships among actors at various levels of the implementation process' (Goertz, 2006: 705). Our argument is substantiated by previous research carried out in the field of social justice in education. By using Cyprus as our 'case', we aim to indicate the importance of researching the process of implementation of education policies for social justice at the micro-level of the school.

Education Policy for Social Justice: Findings from Previous Research

The prevailing discourses, which underscore educational policy, are formed within the broader sociopolitical context. Corollary to this observation is the examination of the sociopolitical evolution of the issue of social justice in Cypriot education. In a highly centralised system, the state via its agency, the Ministry of Education and Culture (MEC), has gradually adopted the rhetoric of 'human' and 'democratic' schooling as the preferable goals of education in Cyprus (Ministry of Education and Culture [MEC], 2010). With the discourse of a 'democratic' school which does not exclude, the MEC promulgated the provision of equal educational opportunities for access, participation and success for all students. The MEC's definition of the term 'democratic' school is 'the school in which all children sustain the qualities characterizing the educated human today. It is the school which provides educational goods adapted to each child's zone of proximal development. While it refuses to assign students to categories, it draws upon the fundamental principle that every child is different and needing appropriate confrontation' (MEC: 6).

Arguably, the MEC has envisioned the creation of a school system that respects diversity and cultural, linguistic and religious pluralism while arguing that education becomes a process accessible by all students. Thus the school system should become conducive to the success of all students despite their diversity. In addition, the MEC (2010: 6) defines the discourse of a 'human' school as 'the school, in which no child is excluded, marginalized, stigmatized, despised or becomes unhappy because of any individuality. It is the school of the absolute respect of human dignity and the school, in which all children can become happy'. In sum, the MEC declares its willingness to promote a social justice agenda while eradicating stereotypes and prejudices. The development of a 'human' and 'democratic' school focuses on the reconceptualisation of educational norms in order to meet all students' individual needs such as different starting points, interests and learning styles.

Hajisoteriou (2010) has conducted a multilevel study examining the ways in which intercultural education policies are mediated and reframed by education institutions in Cyprus. Her findings illustrate that incongruence of values concerning diversity and social justice was evident between and within the groups of policy-makers, school inspectors, head teachers and teachers. Within the overarching thrust towards intercultural education, the MEC's policy has undermined the development of coherent school policies. In the developed policy, both the MEC and its policy-makers argued for the development of all children's potential, regardless of ethnic origin, religion or gender. At the same time, they depicted social justice as the provision of equal opportunities for access to education for all children. In these terms, social justice was understood primarily as the taking of steps to facilitate access of immigrant students into their schools without any differentiated treatment once in school. Such conceptualisations were bounded on values underlying the celebration of diversity, on the one hand, and diversity-blind approaches, on the other.

At the school level, personnel echoed the contradictory value premises articulated by the policy-makers who participated in Hajisoteriou's (2010) study. Consequently, the absence of congruent intercultural discourses and policy goals at the macro-level of the state was mirrored at the micro-level of the schools. This range of values offered a continuum from monoculturalism to interculturalism from within which intercultural school policies would emerged. As school leaders and actors held contradictory values and belief systems regarding diversity and social justice, there was no evidence of a clear process of development of intercultural policies in these schools. In some instances, school inspectors' and head teachers' promulgation of intercultural school policies was merely rhetoric reflecting socially desirable roles that were remote from actual school practice.

On a different route, Zembylas (2010) has attempted to examine the interrelationship between social justice issues and school leaders' emotions. He carried out a case study of a head teacher regarding the emotional aspects for leadership related to social justice in Cyprus. Zembylas's research suggests that efforts to enact leadership in the field of social justice entailed intense emotional development. Although, the head teacher felt a moral duty to promote school success for all of his students, his emotions of helplessness, disappointment, frustration and exhaustion often led to his resistance towards social justice work. To this extent, Zembylas maintains that leadership for social justice should become conducive to collaborative and distributed leadership, meaning the development of teamwork not only within the leadership group of the school but within the broader educational community. The enactment of social justice leadership prerequisites the acquisition of emotional balance on the part of school leaders through strategies including keeping things in perspective and talking with friends and colleagues.

Angelides and Karras (2009) have completed a comparative study on the provision of equal opportunities in Greek and Cypriot classrooms. Their study provides mounting evidence that the implementation of educational strategies promoting equity is not an easy affair. On the contrary, it is a difficult, complex and beset-with-obstacles procedure. In the Cypriot context, specific factors acted as barriers in the teachers' efforts to provide equity, including the school culture and the policies of the Ministry of Education and Culture. Furthermore, most of the teachers and head teachers participating in the study did not have the necessary social learning required to promote equity. Angelides and Karras conceptualise social learning as the learning that comes through the interaction of the different stakeholders within the framework of a community of learning where all collaborate with the purpose of providing equity. The two researchers conclude that in order to overcome the obstacle of educational policy for the purpose of promoting greater equity, we should adopt Ainscow et al.'s (2007) proposal. Ainscow et al. (2007: 3) propose 'the development of national policy frameworks which allow the freedom for local level decision making, guided by principles of shared accountability, local networking, and equity informed target setting'.

The literature discussed above deals with the scarce research that has specifically focused on social justice in Cypriot education, while it mostly consists of small-scale research. However, we may still conclude that despite the presence of a social justice discourse within the Cypriot sociopolitical environment, social justice is often accompanied by witting or unwitting inaction at the school or classroom levels. We then state that in the study of policy for social justice, the micro-politics of policy implementation at the school and classroom levels are of equal importance to the macro-politics of policy formulation at the system level. Nonetheless, the implementation of education policy for social justice cannot be examined in isolation from the policy trajectory. Educational research for social justice should not be located as a single level of analysis (i.e. the state or the school or the classroom), but it should gain an insight into policy dynamics across all levels.

Education Policy for Social Justice: The Politics of Macro- and Micro-implementation

In order to capture the passages from policy decision to policy outcome, we encompass Goertz's (2006: 702) macro- and micro-implementation process; 'that is, how does one level of government (e.g. federal or state) execute its policy in ways that will influence institutions and actors in other levels of the system (e.g. states, districts, or schools) to act in desired ways'. Such an approach involves not only a structural but also a cultural analysis of education policy for social justice examining the ways in which implementing institutions and actors interpret policy and draw their own implementation decisions. Goertz's model of the macro- and micro-implementation process includes four non-linear stages, which we present below. Namely, the four stages are administration, adoption, micro-implementation and technical validity.

To begin with, administration refers to the passage from policy decision to an operational government programme. The policy goals are substantiated in a regulatory framework that consists of selected policy instruments and administrative approach. Such regulatory framework communicates adequate information on the type of support provided (political, financial and/or technical); programme rules, requirements, procedures and service mandates; and programme management. It is noteworthy that strong political support within and outside the school system may promote policy implementation. Nonetheless, the formulation of social justice policies has historically derived in the light of conflicting political demands, addressing equity, on the one hand, and efficiency, on the other. Such political controversy undermines the implementation of social justice policies at the local level. Moreover, programme management implies responsibilities for policy planning, monitoring and evaluation of policy implementation. Policy planning involves the gathering and allocation of fiscal, human and organisational resources to support implementation. However, resource shortage and unwise allocation of resources impedes the implementation of social justice policies.

The second stage of Goertz's (2006) model entails the passage from the government programme to the local adoption of policy. While the regulatory framework presents the official roles and responsibilities of each level of the system and the education institutions to take these roles (e.g. local educational authorities and schools), the stage of adoption examines the actions of these education institutions as the local adopters of policy. Goertz (2006: 703) poses the following questions to be examined at the second stage: 'What does the local program or policy look like? What assistance and resources did local adopters receive from the implementing agency? Is there discrepancy between the intended and enacted policy? If so, what is the nature of discrepancy and why did it occur?' Lastly, the stages of micro-implementation and technical validity comprise the passages from local adoption to implemented local practice and from local practice to outcomes, respectively. The third and fourth stages are composed of the changes in the practices and technologies of institutions which deliver education services.

The local adoption and implementation of policies for social justice is affected by the agreement between local interests and policy goals, communication between the different levels of the system and the availability of resources for implementation. In the examination of the local adoption and implementation, we should take loose coupling into consideration, meaning that the coordination, monitoring and communication of the system may be weakly connected. Loose coupling bears a neutral connotation for implementation as it may have both positive and negative implications for policy implementation. For Berman (1978), 'looseness' pictures that different education institutions, and the actors operating within these institutions, have their own problems, perspectives and goals according to their specific cultures and structures and that institutions as such have more or less autonomy within the macrostructure of the education system.

We have already argued that for social justice to become a reality, emphasis should be placed upon teaching and learning. Notably, loose coupling within schooling has particular salience for teaching and learning. According to Ainscow (1998: 21), in order to reach out to *all* learners, we should develop 'a more tightly coupled system without losing loose coupling benefits'. That is, we should sustain coordination and cooperation within schools without restricting teachers' autonomy to ground their own decisions in their classrooms according to the individuality of their pupils. The successful implementation of any education policy for social justice at the grass roots relies upon teachers' willingness and ability to tailor their practices to their pupils' needs, interests and learning styles.

Conclusions

Education policies should legitimate social justice as an issue to be acted on in the phases of macro- and micro-implementation. Action at the stages of administration, adoption and micro-implementation of policies for social justice may contribute to the development of democratic societies. As policies for social justice should enable *all* children to play a fully participatory role in society, they substantiate active citizenship as a fundamental element of the learning process. As such, active citizenship does not only aim to empower individuals to reach their full personal capacity but also seeks to develop a participative and democratic society reached by active and responsible participation in the sociopolitical and economic domains of the community. Although social justice policies are often targeted to specific groups (i.e. immigrants), they should purport to promote education for all.

Education policies for social justice as active citizenship need to shift to successful policy implementation, which presupposes communication between the different levels of the school system. Policy goals should be in congruence with implementers' cognitive or value systems. Accordingly, agreement on policy and its underlying values between policy-makers, school leaders and teachers implies strong organisational structures that facilitate policy implementation. On the other hand, the inconsistency between the national policy, school policies and implementers' personal and professional value systems may lead to policy slippage. Bevan-Brown (2006) defines policy slippage as the implementers' resistance to policy implementation. The reasons behind their resistance may be rooted within their personal or group interest, which is affected by the policy, the inconsistency between the policy and their personal and professional value systems and/or poor decision-making processes.

It is noteworthy that policy slippage could 'sabotage' the implementation of promising policies for social justice. Detrimental social and individual beliefs and practices often disrupt the implementation of such policies for social justice. Implementers' responses to policies being inconsistent with their values or lacking cohesion may include the abandonment of the organisation (i.e. school), the expression of their concerns about the policy, or their failure to conform the policy either by mutating the policy initiatives or by deliberately delaying policy implementation. Policy administrators should critically listen to and analyse the implementers' objections, as legitimate objections can potentially suggest policy modifications through mutual adaptation between the policy for social justice and the setting. Otherwise, policy administrators should persuade implementers for the benefits of the developed policy for social justice. Changes in the policy-making and in the practice of social justice should be accompanied by a shift of beliefs, preferences and values related to social justice (*thick learning*) across both the macro- and micro-levels, rather than the adoption of adaptation and coping strategies in response to external stimulations, such as political pressure (*thin learning*).

Changes in the beliefs of policy-makers, school leaders and school actors may be the outcome of learning processes occurring in-between collaborative networks, which gradually become communities of learning on social justice issues. The implementation of collaborative networks may generate new ‘knowledge’ on justice-related issues, while it may influence the decision-making processes both at the macro- and micro-levels. Such networks are assembled as ‘learning consortiums’, within which policy actors across all levels of the system operate both as learners and partners in the construction of knowledge for social justice (Lieberman & Wood, 2003).

At the heart of a collaborative network, there are people working together. Ideas are generated and activities are implemented. Learning is documented and shared to spark new ideas and to begin the cycle over again. However, these processes, Creech and Willard (2001) argue, do not occur automatically. Collaborative networks, they contend, can cause frustration and undercut the feelings of mutual admiration and appreciation that may have attracted members in the first place. Joining a collaborative network entails a long commitment to collaborative effort. In order for a network to exist at all, Creech and Willard conclude, careful attention must be given to how members will be managed.

Collaborative networks are directly connected with communities of practice and professional learning communities (see Stoll & Seashore Louis, 2007). Wenger (1998) mentions that in most institutions when referring to learning issues, these are largely based on the assumption that learning is an individual process, that it has a beginning and an end, that it is best separated from the rest of our activities and that it is the result of teaching. Wenger makes this comment in order to subsequently argue that learning is a social phenomenon and that it is achieved better when there is social participation and in particular when there is participation in ‘communities of practice’. Knowledge, for Wenger, is inseparable from practice, and it is integrated into the life of the ‘community of practice’ where members share values, beliefs, language and the way they do things.

Wenger (1998) talks about ‘communities of practice’ and describes the transfer and the creation of knowledge within a workplace. The members of a community of practice transfer their knowledge and ideas from the one member to the other through the processes of ‘negotiation’ during which common meanings are created. In this way, new knowledge is generated. This knowledge is put into practice and is inevitably modified because it is influenced by new experiences and new contexts. Moreover, this knowledge is transferred from the one member to the other, and it is continually refined and modified. Thus, the knowledge is recycled within the community, and gradually with this cycle, the community increases its knowledge as well as its understanding of a situation. During the collaboration, those who collaborate have the opportunity to work, having common purposes and beliefs and sharing and using each other’s knowledge, and through the process of sharing, reflection and recycle, they create new knowledge.

Communities of practice are groups of people who share what they know, learn from each other regarding issues of their work and provide a social context for this work. For Wenger (1998), communities of practice develop around things that are important to the people involved. The fact that these communities are organised around a certain area of knowledge and activity, Wenger continues, gives their members a feeling of a common enterprise and identity. In order to function, a community of practice needs to produce and assimilate a common repertoire of ideas, obligations and memories. Moreover, as Wenger points out, the 'community of practice' needs to develop certain resources like tools, routines, vocabulary and symbols, which carry, in a way, the accumulated knowledge of the community. In other words, the 'community of practice' includes practice. That is, in the community of practice, the ways in which members do or approach something are common to a significant degree among the members. The members of a community of practice are virtually connected in a collaborative network where they interact, reflect and have common experiences, aimed towards a common purpose.

Successful collaborative networks – or communities of practice – therefore, have the potential to re-culture the environments within which policy-makers are operating to create more collaborative and multi-agency endeavours (Chapman & Aspin, 2003). In addition, the realisation of across-level collaborative networks can significantly contribute not only to implementers' professional development but also to the improvement of schools in the field of social justice. In these ways, collaborative networks may provide for more effective policy development and implementation with regards to social justice.

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Chapter 46
The Role of Academicians' Networks in Latin America: The Fight Against Social Injustices. An Institutional Challenge

José Antonio Ramírez-Diaz, Jesús Ruiz-Flores, and Antonio Teodoro

Education and Social Policy in Latin America and Europe

Social Policy

By the first quarter of the twenty-first century in most countries in Latin America, the foundations of welfare regimes had been laid and lead to important actions in the field of public health, such as health campaigns, vaccination, and health education. In education, through the Ministries of Public Education, the State assumed responsibility for providing primary education to all people. During the first half of the twentieth century, achieving national integration was one of the principles that promoted and justified social and economic policies as priority actions due to the large dispersion and isolation from population centers. The actions of governments in this direction were the construction and expansion of highways and roads to reach to small towns, cities, and states, to facilitate the transit of goods, services, and people.

In Mexico and other Latin American countries, Welfare State took the form of arrangements between government, employers, workers, and other sectors of the population to generate and distribute welfare. As these arrangements were subjected

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to the 6-year temporary government, they became what experts identified as a *welfare scheme*. This expresses a difference in the characterization which we will be looking to perform here on the evolution of social policy between the two regional blocks, because, as pointed out by Fleury and Molina (2000), “It was the recognition of poverty as a social problem that created the conditions for the development of powerful institutional mechanisms of social protection in the European context, known as the State Social Welfare (Welfare State).”

The *grosso modo* review we show here from the post-Second World War assumes that it is from this period in which different Latin American countries share relatively similar stories in economic and social terms. While in the post-war period the attention of governments in developed countries focused on the reconstruction of the standards of economic and social well-being that were seriously damaged or destroyed by war, the deployment of social development policies in Latin America were initiated and they embarked on a process of industrialization by import substitution, which emphasized economic growth. Since the 1980s, Latin America has experienced a decrease in the relative share of social spending in state budgets. Social security systems, public health, and education, which are fundamental to the achievement of social development, were seriously affected.

In order to contribute to the understanding of current social policy and developments and transformations of the welfare regime in Latin America and its relationship with the European Union, we focus initially on the periodization made by Carlos Barba (2004) with appropriate settings for the purposes of this chapter, as well as the reflections of Marco Antonio Rodriguez Camacho (2003) and several authors in *Social Development* of the Center of Social Studies and Public Opinion (CESOP, in Spanish) (2006).

Linkages Between Social Policy and the Imports Substitution Development Economic Model (1940–1970)

From the 1930s, health campaigns spread and began the systematic provision of health services, and measures were undertaken to extend public education beyond the primary level. By the 1940s, as discussed by Wilkie (1974), governments put greater emphasis on achieving economic growth through industrialization. Although state promotion of social development continued, economic growth was considered the mechanism *per se* to raise the standard of living of the population. To expand and diversify the production structure, the actions of well-bounded urban organized groups resulted in the improvement of various social indicators, especially in terms of expanding health coverage and education.

State intervention in the economy was financed with income from raw materials in various countries, such as oil in the case of Mexico; incomes were insufficient, and that opened the appeal of using the fiscal deficit. The strategy of economic growth without inflation and low deficit, known as stabilizer development, was encouraged by the proposals for economic growth through import substitution industrialization promoted by the Economic Commission for Latin America and the Caribbean (ECLAC). These recommendations coincided with the nationalist discourse and objectives that characterized this period, which were applied in much of the Latin American region.

In this period, social security had already been established in several Latin American countries (Argentina, Chile, Uruguay, among others), with lag in some countries, including Mexico. In the mid-1960s, the social protection system recorded a remarkable achievement to make mandatory contributions for the social housing business.

For Viviane Brachet (1996), the most significant feature of Mexico in the 1940s was the emergence and consolidation of corporatism, which became crucial for social development, as much of the welfare benefits and social security since then was assigned to groups of organized workers. Thus, Brachet finds that social security and progress in labor was a way to control the labor movement before the advance of socialism and the beginning of the Cold War, a situation which was common in different latitudes of the region.

International agencies began to increase its influence in designing social policies through the dissemination of European welfare measures as a model to raise the standard of living of the population or through the active involvement of agencies such as the Inter-American Development Bank (IDB). Before the triumph of the Cuban Revolution, the U.S. government, in 1963, created the Alliance for Progress (ALPRO) as the social development agenda in this decade, a strategy that had broad support from multilateral institutions such as the World Bank and the IDB.

High population growth was a big problem for employment policies, education, housing, health care, and human settlements, and the coverage of demand for food and clothing were inadequate in relation to the amount of funding provided by the ALPRO, the IDB, and the International Bank for Reconstruction and Development (IBRD) declined drastically. Cordera and Lomeli (2005) report that, in Mexico, the substitutive industrialization strategy favored economic growth, but shaped and unbalanced social development; although there was a relative reduction of poverty, social inequality emerged as an inherent feature of the country's social development.

The economic and financial instability in the early 1970s was seen as an expression of attrition of the *stabilizing development model*.

Precursor Social Policies to Combat Poverty (1970–1980)

Cordera and Lomeli considered as precursors three programs. The first is the Public Investment Program for Integrated Rural Development (PIDER, in Spanish), created in 1973 to integrate existing programs at the three levels of government for the rural environment. Part of the resources came from multilateral agencies, such as the World Bank and the IDB.

Two flagship programs created in 1976 were the National Plan for Depressed Areas and Marginal Groups (COPLAMAR, in Spanish) and the Mexican Food

System (SAM). The first – remarkable in the history of policies to combat poverty – conducted an extensive assessment of the situation of marginalized groups and areas of the country. The results showed a radiograph of the marginalization that made it possible to program specific actions in the fields of health, food supply, rural housing improvements, expansion of potable water networks, electrification, road construction, and support for peasant activities organization. Although the program was in effect only from 1976 to 1982, the focus of attention to marginalized groups, especially in rural areas, was an implicit recognition that universal policies and widespread consumer subsidies applied so far did not reach those segments of the population, as revealed by studies conducted by the same COPLAMAR (1983).

The SAM purposed to fight the loss of food self-sufficiency and agricultural commodities contributing to reducing poverty. The COPLAMAR and SAM were canceled at the beginning of the financial and economic crisis of the early 1980s (Cordera and Lomeli, *op. cit.*), a crisis that resulted in the structural adjustment process, which lead to a profound change in social policies.

Recurrence of Crisis and Change in the Paradigm of Welfare (1980–2005)

In all countries, there are private systems of provision besides public social services. México, Argentina, Costa Rica, Cuba, Uruguay, Brazil, Jamaica, the Bahamas, and Barbados all have more extensively developed social security systems. At least formally, 70 to 100 % of the population of that group of countries is covered by that system. At the opposite extreme, we have countries like Honduras, Guatemala, El Salvador, Dominican Republic, and Bolivia, where only a maximum of 20 % of the population is covered by public social security systems. Since 1988, there began a new stage of social policy through an alternative package of social welfare that sought to compensate for the socially disadvantaged with scarce fiscal resources.

Several experts (Brachet, 1996; Gordon, 2000) agree that social policies in the early 1990s meant an *easing of open market policies*, with a new approach to welfare policies, in which *assistencialism* together with selective social policies and targeted programs are found.

As pointed out by Rodriguez (2003), international agencies agreed on the requirement of a structural adjustment that is more *humanitarian*. Thus, in the 1990s the World Bank supported the development of strategies to fight poverty, but because they were subordinated to the economic structural adjustment, they worked only as a "buffer" – and only in the short term – for the social costs of adjustment.

In addition, the IDB and the United Nations Program for Development (UNDP) produced a Latin American social reform that relied more strongly not only on compensation and assistance programs in the short term and in various public and private services, but also in the integration of economic and social policies to create jobs. The State is, again, assigned a major regulatory role. The ECLAC also sought structural reforms aimed at producing social opportunities for education and productive employment for the disadvantaged, and, above all, seeking to eliminate the long-term structural poverty.

The oil boom of the early 1980s in Mexico – which turned out to be very short – permitted new social reforms, but was interrupted almost immediately by the emergence of the crises in 1980–1982, which were triggered by the inability to repay foreign debt. A reform of the State was initiated; it involved, amongst other things, public sector downsizing and rethinking the role of government in social policy (Brachet, *op. cit.*). The economic model to guide the economic and trade liberalization and financial deregulation was much in line with the explicit inclusion of the country's economy into the global economy during the presidency of Miguel de la Madrid. This process brought about profound changes in the design and implementation of social policies, such as the replacement of universalism – which privileged the middle and upper strata of urban groups – selective policies, and programs targeting the segments of the population in greatest need and longest lags.

The adjustment process initiated in 1982–1983 on public spending in general and particularly social cuts was substantial. Social policy was subject to criteria of efficiency in resource allocation. The lack of funds to meet the demand for public goods and services widened social inequality and poverty increased. It is estimated that over 40 % of Latin Americans lived in poverty, many in extreme poverty. The relative share of social spending in state budgets decreased. Social security systems, health, and education – fundamental to the achievement of social development – were seriously affected. During this period, spending on new investments and maintenance of equipment were drastically reduced; in some countries, these costs fell to 70 %. This period is characterized by the absence of compensatory social policies to cushion the effects of the crisis and structural adjustment; with the exception of regional employment programs, the effects were very limited.

The above two paragraphs express the view taken by the cabinet predecessor Carlos Salinas de Gortari (1988–1994) in México, and from whose criticism formed the National Solidarity Program (PRONASOL), and with more explicit support of the guidance and support given by international agencies. Rolando Cordera (*op. cit.*) reports that to the cumulative lags were joined the demand for new services, such as building more schools, the expansion and rehabilitation of basic infrastructure (water, sewer), and the housing backlog and demand for health services, both from recipients of institutional systems and those who were external to them.

The linchpin for actions of PRONASOL was the building of social relationships in the communities in extreme poverty. Resources were provided directly to communities, a situation that Mariñez (2003) noted did invoke patronage of the program, and was certainly criticized at the time. The program was aimed at indigenous peasants in extreme poverty and marginalized urban groups most affected by adjustment policies. The actions took place in the areas of nutrition, health, land, housing, education, and agricultural infrastructure. According to Mario Coria (2005), the impulse to social networks in each community was one of the peculiarities of PRONASOL, unlike previous welfare programs that left no space for the participation of people.

Cordera (*op. cit.*) identifies that, while social spending in 1988 accounted for 31.9 % of programmable expenditure, in 1993, it accounted for 51.1 %, with health, education, and the lines of social spending having higher increases. In 1997, endorsing the sectional changing nature of public policies in Mexico, the Education, Health, and Nutrition Program (PROGRESA) replaced PRONASOL. The PROGRESA had a comprehensive social policy approach, included health services, food, and education to develop the capacities of individuals and families in extreme poverty, incorporating a gender approach intended to promote the attendance and retention of girls in schools and the role of women at home; women were appointed to manage the monetary transfers that the program provided.

Starting from 2001 – and the promise of political change in the country – PROGRESA was converted to the Human Development Program (OPORTUNIDADES). This program began its activities in response to families in extreme poverty in rural areas, while OPORTUNIDADES has extended its coverage to urban areas. OPORTUNIDADES, which is a conditional cash transfer program aimed at training human capital, is considered by the International Food Policy Research[1] as a social program that is successful and distinguished by its design, operation, and good results in reducing extreme poverty, and which has been encouraged to be taken as a model for other countries in Latin America.

The OPORTUNIDADES program is part of CONTIGO, which is a comprehensive strategy aimed at the social development of poverty reduction. CONTIGO is conceived as a new approach to social development, overcoming the shortfalls of previous programs, which tended to duplicate efforts and, on the other hand, to leave priority areas unattended. According to Miguel Székely (2002), "The central idea in the new strategy is that poverty in Mexico and, in general, social disadvantage, are mainly caused by high inequality in the possession of resources and not by the inability of the economy to generate goods and services for the entire population." In a kind of self-criticism and self-justification, David Ibarra[2] (2004) considers that economic reforms have given mixed results for its success in achieving fiscal balance and control inflation; however, the pace of economic growth and development of the labor market have not been favorable for the reduction of poverty in Mexico.

The CEPAL (2004) notes that two general characteristics in the countries of Latin America in the 1990s have been the tertiarization and informalization of the economy, and poor economic performance combined with a profound transformation of the occupational structure; employment fell in primary and secondary sectors, and increased in trade and services. This resulted in the growing informalization of the labor force; it was estimated that, in Mexico, there were 8.6 million persons employed in the informal sector in 1995, equivalent to 25.7 % of total employed persons. The CESOP (2005) estimated that, by 2003, employment in the informal sector had increased to 10.8 million people, representing 26.7 % of the total

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[1] *PROGRESA, Rompiendo el ciclo de la pobreza*. http://www.ifpri.org/spanish/pubs/ib/ib6sp.pdf.

[2] David Ibarra Muñoz was Ministry of the Secretaría de Hacienda y Crédito Público in the José López Portillo period (1976–1982).

occupation of the country, while by 2005, the informal sector production accounted for 10 % of the GDP. It is worth remembering that this large segment of the population in the informal economic activity has no access to social security or institutional health services; only from 2003 was the *Seguro Popular* available.

As a partial closure, we can say with Cordera and Lomeli (2005) and Boltvinik (2000) that economic policy has not been beneficial for the improvement of welfare conditions in the last 25 years, since there is no congruence between the objectives of social policy and economic policy. In fact, social policy has worked as a palliative for the negative results of low economic growth and structural adjustment processes.

Social policies and programs to overcome poverty were refined taking the PRONASOL experience and, above all, the World Bank recommendations. The approach of selective and targeted programs implies the view that poverty reduction can only be achieved with the participation of beneficiaries (the co-responsibility).

In the intention to remove the bias of welfare, both programs have emphasized the development of the capacities of people to stop the intervention of public policy to deal with the elements in the labor market and social life. However, given that governments continue to consider the *assistencialism* as a resource to maintain social control, and, consequently, its paternalistic view, despite the criticism of the populist PRI government promises, in the short term, we do not see it as a solution to equity issues.

Different governments have not neglected in their speeches education as a "tool" for the "leverage" of development, and we really consider that a broad sense is, indeed, a social resource for social and individual emancipation. However, few countries have placed meaning on education as a key factor for social change. We will review this topic in the next section.

The Educational Policy. From Developmentalism *to* Neoliberalism*: The Fading of Social Perspective*

In a similar temporal scheme to the previous section but in "packages" that are more compact, we will review the "discourses" on the role of education in Latin America, taking as reference the *Summit of the Americas* meetings (Feldfeber & Saforcada, 2005) and approaches of the ECLAC (Solano, 2000).

Regardless of how grounded conceptualization of the welfare state came to Latin America, which, for us, is more appropriate to refer to as *welfare regimes* (as defined at the beginning of this chapter), there is some consensus that, in the documents of the first summits (1956 and 1967), education, science, and technology are conceived as the basis of comprehensive development and social welfare of *developmentalism*.

On the other hand, in the first two summits of the "new process" – Miami, 1994 and Santiago de Chile, 1998 – we can find a change in paradigm, in diluting the link between education and overall development and welfare, strengthening its relationship with economic development and competitiveness. Public education, therefore, is considered more as a palliative than a State's duty towards the whole society. In line with the goal of limiting social policies and developing targeted policies, typical of the neoliberal model, public education is raised in response to problem situations and attention focused on vulnerable social groups. It redefines the State's responsibility in education, moving to develop policies for dealing with diversity and poverty. Thus, education policy loses the reference of a social right to be guaranteed on an equal basis to all.

Based mainly on the document "Changing production patterns with equity, the priority task for Latin America and the Caribbean in the Nineties" (UN/ECLAC, 1990), Solano (2000) identifies the *shift* that occurs from the "education for development" to "education for productive transformation with equity," with ideological, political, and economic implications.

Even more, the paradigm of education for productive transformation with equity is not yet well assimilated, when education and *knowledge*, along with technology, are conceived as central to the achievement of competitiveness and penetration of international markets, but still with the remaining pending tasks of democratization and the achievement of equity (Solano, 2000: 84).

Therefore, it will not stop ringing strange that, meanwhile, our societies are being demanded to advance to the *knowledge society* – as technologies are available to do so – when there are major delays not to say in the modernization and democratization of institutions, but of social backwardness: lags such as low schooling compared with developed countries, high rates of poverty, unequal distribution of welfare, and so on.

Even so, but rather because of that set of situations that make reality more complex, is that opportunities for integrated approaches in areas of knowledge is seen as desirable, feasible, and urgent. Therefore, in the following section, we discuss in more detail the possibilities of a more equitative development and try to identify the role that higher education institutions could play, as well as academic institutions and their explicitly intended research-oriented networks.

Process Integration of Knowledge in Latin America and Europe

We are going to consider two initiatives whose objective considers integrating knowledge between Latin America and Europe: (1) The Ibero-American Space for Knowledge (EIC) that emphasizes its connection to productivity and competitiveness, giving priority to higher education and research, development, and innovation (Summit, 2005, Salamanca) and (2) The Latin America, the Caribbean, and the European Union Common Area of Higher Education (ALCUE Common Area of Higher Education), which considers education as "a public good, essential for human development, social and technological … essential for overcoming inequalities between individuals, educational institutions and national societies, and the balanced exercise of their interdependence" (ALCUE Portal).

The EIC conceives the regional integration of knowledge as an interactive and collaborative space between universities, research centers, and companies for the generation, dissemination, and transfer of knowledge on the basis of complementarity and mutual benefit. As for the ALCUE Common Area of Higher Education, the regional integration of knowledge is a Latin America–Latin America and between Latin America and the European Union higher education systems infrastructure for cooperation at the institutional, national, and regional levels for academic cooperation and integration.

The Ibero-American Space for Knowledge (EIC)

The EIC is promoted by the Organization of Ibero-American States for Education, Science, and Culture (OEI, in Spanish), among other organizations, an initiative that arises in the context of the Summit of Heads of State and Government, held annually since 1991. The agency noted the reiteration of the need for regional cooperation mechanisms, and current circumstances in the world make it even more necessary. The EIC is formally defined in the XV Summit of Salamanca (2005), where the text of the Declaration states that the "Iberoamerican Space for Knowledge, will be oriented to the necessary transformation of higher education, organized around the research, development and innovation, which are necessary to increase productivity by providing better quality and accessibility goods and services for our people and the international competitiveness of our region…" (Article 13).

In the OEI Summit at Santiago de Chile (2007), the "Latin American Initiative mobility for master and doctoral students" was approved, and seeks to promote the training of young scientists and technologists required by the region. The most advanced action of the *Initiative* is expressed in the *Pablo Neruda Program*, which is aimed at graduate academic mobility, of the subregional, regional, and multilateral levels. It is structured in thematic networks formed by higher education institutions of at least three countries participating in the program. It specifies that governments define priority areas which science and graduate programs may participate, provided they have accreditation of the quality of their respective national agencies and have the guarantee of academic recognition by the university of origin.

On the basis of common language, education is considered a natural place for the Latin American, and, in this context, is where it presents its full potential of building the Ibero-American Education Higher Education Area, which, in turn, will be fully linked to the Euro-Ibero American Higher Education Area.

The OEI considers promotion and support to research networks as fundamental to boost the Ibero-American Area of Knowledge, and includes support for the mobility of researchers and students. Human resources training in the field of science, research, and innovation should be targeted not only nationally but throughout the region. Among the objectives are:

(a) Promote cooperation aimed at continuously improving the quality of higher education;
(b) Strengthen efforts to create networks of cooperation and academic exchange and research, as means to build the Ibero-American Area of Knowledge;

(c) Support national science and technology for the development of national science, technology, and innovation;
(d) Promote scientific literacy and stimulate young people's dedication to the study of science and technology, while embracing the independence of mind and a sense of critical responsibility;
(e) Develop and strengthen scientific and technological capabilities of Ibero-American countries and highly qualified human resources;
(f) Promote a science and technology agenda that is responsive to the Ibero-American social demands for knowledge and to promote equity and social cohesion.

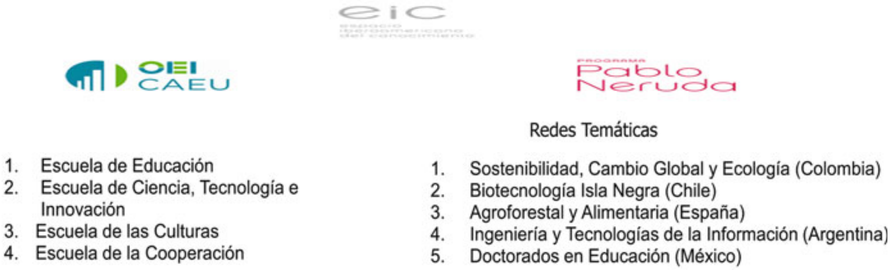
As strategies:

(a) Consolidate the University Center for Advanced Studies (CAEU) of the OEI as a means of energizing the Ibero-American Area of Knowledge;
(b) Enhance the operation of the Ibero-American Observatory of Science, Technology and Society as a tool for the monitoring and evaluation of policies for science and higher education in the context of the Ibero-American Area of Knowledge;
(c) Implement and consolidate a system of mobility of students, with recognition of studies, as well as researchers and university professors from Latin American countries;
(d) Create opportunities for interaction and collaboration between universities, research centers, enterprises, and social organizations for the generation, transmission, and transfer of knowledge and to generate social demands;
(e) Strengthen the technical teams of national science and technology in design, management, and evaluation;
(f) Advise on the design and implementation of actions aimed at promoting scientific careers among students, in coordination with the educational policies;
(g) Establish disciplinary and interdisciplinary networks of academic and research cooperation in education, science, and culture;
(h) Establish, under the coordination of the General Ibero-American Secretariat (SEGIB), lines of joint work with other Ibero-American programs in science, technology, and innovation.

The last strategy is expressed in Fig. 46.1.

The Latin America, the Caribbean, and the European Union Common Area of Higher Education (ALCUE Common Area of Higher Education)

This is an initiative of the European Union countries, Latin America, and the Caribbean, favored by the Inter-American University Organization (OUI) for the creation of an environment of bilateral and multilateral interaction among higher education systems. Its origin is in the Rio de Janeiro Summit, on June 29, 1999, in which the Heads of State and Government expressed their political will to strengthen

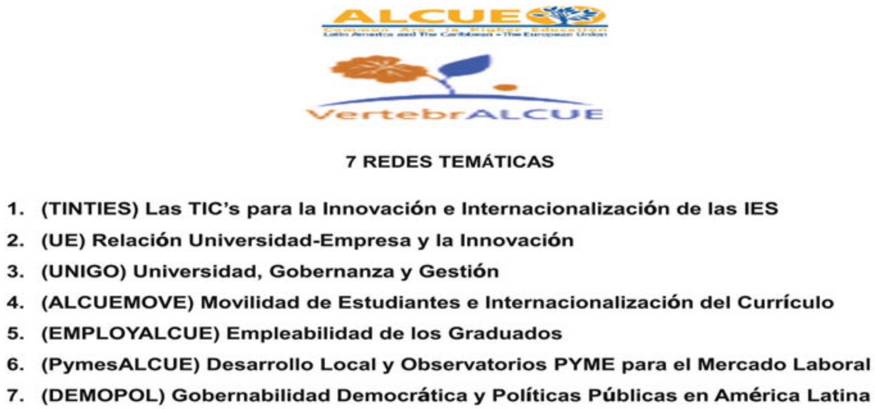

eiC
espacio iberoamericano del conocimiento
OEI
CAEU
PROGRAMA
Pablo Neruda

1. Escuela de Educación
2. Escuela de Ciencia, Tecnología e Innovación
3. Escuela de las Culturas
4. Escuela de la Cooperación

Redes Temáticas

1. Sostenibilidad, Cambio Global y Ecología (Colombia)
2. Biotecnología Isla Negra (Chile)
3. Agroforestal y Alimentaria (España)
4. Ingeniería y Tecnologías de la Información (Argentina)
5. Doctorados en Educación (México)

Fig. 46.1 EIC interactions and support


ALCUE
Common Area in Higher Education
Latin America and The Caribbean – The European Union
VertebrALCUE

7 REDES TEMÁTICAS

1. (TINTIES) Las TIC's para la Innovación e Internacionalización de las IES
2. (UE) Relación Universidad-Empresa y la Innovación
3. (UNIGO) Universidad, Gobernanza y Gestión
4. (ALCUEMOVE) Movilidad de Estudiantes e Internacionalización del Currículo
5. (EMPLOYALCUE) Empleabilidad de los Graduados
6. (PymesALCUE) Desarrollo Local y Observatorios PYME para el Mercado Laboral
7. (DEMOPOL) Gobernabilidad Democrática y Políticas Públicas en América Latina

Fig. 46.2 VertebrALCUE research networks

relations between these countries and identified higher education as a priority. The main goals and objectives of the ALCUE Common Area of Higher Education were established at the Conference of Education Ministers of European Union countries, Latin America, and the Caribbean, held on 2 and 3 November 2000 in Paris, whose Declaration envisages higher education as a public good, essential for human development, social and technological, and stated as being essential to overcoming inequalities between individuals, educational institutions, and national societies, and the balanced exercise of its interdependence. Actions take into account the fundamentals of common cultural heritage of the countries of the European Union, Latin America, and the Caribbean to contributing to promoting mutual understanding of those countries and stimulating the interaction of its colleges, universities, and non-universities, and their respective education systems.

This initiative has, in VertebrALCUE, the strategy factor in the process, in accordance to the different levels of articulation in academic cooperation in Latin America – Latin America and between Latin America and the European Union, through the design and implementation of an infrastructure of cooperation at institutional, national, and regional levels. This infrastructure is made up of 25 Units in VertebrALCUE among the member institutions. See Figs. 46.2 and 46.3.

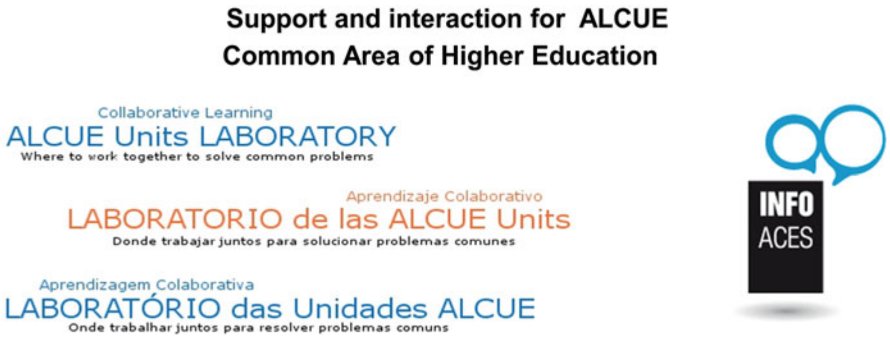

Support and interaction for ALCUE
Common Area of Higher Education
Collaborative Learning
ALCUE Units LABORATORY
Where to work together to solve common problems
Aprendizaje Colaborativo
LABORATORIO de las ALCUE Units
Donde trabajar juntos para solucionar problemas comunes
Aprendizagem Colaborativa
LABORATÓRIO das Unidades ALCUE
Onde trabalhar juntos para resolver problemas comuns
INFO
ACES

Fig. 46.3 Support and interaction for ALCUE Common Area of Higher Education

For the explicit purpose of this text, it is important to highlight the relevance of several projects. The fundamental purpose of DEMOPOL is to contribute to the definition and implementation of public policies […] to build democratic societies that are more just and inclusive. This network is coordinated in Argentina (Buenos Aires Representation at the University of Bologna) and Bolivia (Bolivian Centre for Multidisciplinary Studies). Along with DEMOPOL and in a sense of complementarity, UNIGO aims to facilitate innovation and improvement in university management and governance. This network is coordinated from Colombia through the Colombian Association of Universities and ANUIES in México. EMPLOYALCUE (employability of graduates) exists to strengthen the link between university and professional sectors requiring graduates and reduce the gaps between labor demand and supply of graduates from higher education. This network is coordinated from Chile (Universidad Central de Chile) and Italy (University of Bologna).

So, as Fig. 46.3 shows, VertebrALCUE together with INFOACES give support to this initiative. INFOACES is an ambitious project whose aim is to improve the quality and relevance of Higher Education Institutions (HEIs) in Latin America and to increase its contribution to the social and economic environment. To do this, INFOACES will generate comprehensive information on all Latin American IES and will allow institutional development and academic cooperation between the participating institutions and serve to support the development of the Common Area of Higher Education (ACES) in synergy with the European Union.

It is defined by Jose Carot as “An information system [that] will facilitate comparison of quality and case studies of good practice, [will] allow the definition of university policies based on the actual analysis of results and facilitate the transparency of the system of higher education in Latin America, an essential condition to build the Common Area of Higher Education (ACES), a common goal of Latin American countries and the European Union.”

The Role of Institutions and Academic Networks on Social Injustice

In Latin America, México along with Chile were among the first countries that made changes to the economic subsystem, conforming to the neoliberal trend that was implemented in Latin America in the late 1980s and early 1990s. With this, all social and educational policy became, for the purpose of responding to the significant changes that evolved during the growth of world trade, the emphasis on democracy and reducing state intervention in the economy.

Over time, the consequences of policies are meant to become an obstacle to the aspirations of vulnerable groups to pursue higher education. Mexico's history records the passage of a period characterized by the absence of policies on higher education (1950–1968) to its formation as a subsystem that has closer links with business and consumer markets and the production of goods, a concept that was part of the modernization of Mexico, designed by the government of Carlos Salinas de Garter (1988–1994). During this period, the government created the Fund for Educational Modernization (FOMES), and, in 1992, it joined the National Agreement for the Modernization of Education, amending in 1993 the Mexican Constitution and also promulgates the General Law of Education with the purpose of promoting a high-quality education system (Mendoza et al., 1986).

During the Salinas government, four strategic lines for higher education were raised: "… evaluation, competition for funding, opening and linking educational institutions and the productive sector, and organizational reforms" (Mendoza et al., 1986: 239). By the 1990s, evaluation became the central strategy to increase quality in higher education emerging what is known as the *Evaluator State*, reflected in a remote control of universities and conditioning funding to specific criteria, focusing on the use of measures and actions that appealed to assess excellence and relevance (Mendoza et al., 1986). To it was added a set of measures that radically transformed academic life, measures such as: the dehomologation wage, the creation of competitive funds for the purpose of modifying the scheme of resource allocation to universities, processes of evaluation by external bodies to the institutions, assigning a high importance to the quality of programs, and the social relevance of the institutions.

On this idea of modernizing the educational institutions appeared the first national assessment, reflecting the reality of education in the social sectors. It was found in the *National Assessment of Education*, developed in 2000, that young people from marginalized groups face serious barriers to entry, retention, and graduation in higher education institutions. Similarly, it was discovered that this educational level was attended by only 11 % of those living in poor urban areas, 3 % of those living in poor rural areas, and only 1 % of those belonging to indigenous groups. This situation created interest in responding to the issues of equity. To do so, aims were directed to expanding and diversifying opportunities of access to higher education and offer educational opportunities to disadvantaged social groups. This included the diversification of institutional profiles and educational opportunities in states of different types of open and distance learning.

However, over time, the measures taken were scarcely investigated and analysis of the issue does not transcend the public domain, which is why the phenomenon of educational exclusion are unknown nationally, and, specifically, higher education discussion is practically abandoned. This situation, resulting in a reduced level of information available, has led us to write this section, based on the national census of 2010, which, while it provides updated statistical data, lacks disaggregated information of regions or particular cases.

In writing this section of the report, we developed a strategy for comparing the poorest states and states that reflect less poverty and can be considered among the states with the greatest drive to national development. By this procedure, we form a comparison of the conditions experienced by the inhabitants of the poorest states in order to enter and remain in colleges of education. The three states that have traditionally made up the specter of poverty in Mexico are Chiapas, Guerrero, and Oaxaca, according to data provided in the last measurement of poverty. The evaluation carried out from 2008 to 2010 by the National Council for Evaluation of Social Development Policy (CONEVAL)[3] was updated with data from the 2010 Census conducted by the National Institute of Statistics and Geography (INEGI).

According to figures from CONEVAL, for 2010, there were 52 million people in Mexico considered to be in poverty, representing 46.2 % of the total population. States with the largest population living in poverty are Guerrero, which ranks first in terms of poverty, Oaxaca the second, and Chiapas occupying the third place.[4] In all three cases, the degree of social backwardness is considered to be very high.

The population living in poverty in Mexico has common characteristics: living in rural areas with homes devoid of basic services such as water, sewerage, and electricity; deprived of well-paid jobs, and social security as well as cultural and cognitive deficits suffered because educational services are poor. While it is true that the states of Guerrero, Oaxaca, and Chiapas are states which historically manifest poverty, it is not concentrated in this region; rather, poverty should be understood as a social scourge that is distributed across the different municipalities of Mexico and that it accurately expresses the enormous social inequality prevailing in the country.

Measurements by municipality in Mexico are not common, but data from the latest figures from the 2005 Human Development Index (HDI) by local authorities, on the basis of information from the 2000 General Census of Population and Housing, generated a huge dataset on wealth inequality in the country. At that time, there were 2,443 municipalities, of which only 20 were classified as entirely urban, as the population of all their locations exceeded 2,500 people. Similarly, 911 of these municipalities were considered as totally rural, given that among the total of their localities, the people who inhabit them numbered less than 2,500. Of all Mexican municipalities, 120 had fewer than 1,000 inhabitants and the 11 most populous municipalities made up 14 % of the population (PNUD, 2004).

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[3] The measurement of poverty made by the CONEVAL considers the following variables: current income per capita, average educational gap in the household, access to health services, access to social security, quality of living space, access to basic housing services, access to food, and degree of social cohesion.

[4] In 2005, these same states ranked in descending order in the measurement of poverty. The classification was as follows: Chiapas (1st place.), Guerrero (2nd place), and Oaxaca (3rd place) (CONEVAL, 2010).

Within the same state, there may be significant differences as to when the analysis was performed by the municipality. This is the case in 2004, when municipalities with the highest quality of national life, that is, those who occupied the top ten in terms of HDI, is concentrated in five states. Five of the ten municipalities were in the Federal District, two in Nuevo Leon, one in the State of Mexico, one in Morelos, and one in Oaxaca. A similar phenomenon appeared in the ten municipalities with the lowest HDI, that is, the poorest municipalities or those with a lower quality of life were distributed in just four states of the Republic. Four belonged to the state of Oaxaca, three to Chiapas, two to Veracruz, and one to Guerrero.

Thus, the inequality can be reflected within the same state, in this case of Oaxaca, which had rich and poor municipalities in the same measurement. This situation is common in all states of Mexico (PNUD, 2004).

The last measurement shows that the poverty situation in Chiapas is serious; it affects 78.4 % of the population. For Guerrero, the index is 67.4 and, for Oaxaca, it is 67.2 %. In these states lives a large proportion of indigenous population[5]: in the case of Chiapas, 1,209,057, 1,203,150 in Oaxaca, and in Guerrero 481,098. Among the three states, there is a total of 2,893,305 indigenous people, equivalent to 41.8 % of indigenous people throughout the country. To this sum, there are a large number of people with a disability.[6] In Chiapas, there are 168,968 people with disabilities, in Guerrero 166,430, and in Oaxaca 227,262. Much of that population is in the preparatory school age range (National Council for Evaluation of Social Development Policy [CONEVAL], 2010; National Institute of Statistics and Geography [INEGI], 2010).

For the purposes of our work, it is important to reveal the conditions under which vulnerable groups need and receive support to join the national education system, specifically, higher education. We, therefore, consider as an axis of reflection the three poorest states in Mexico to compare with the support and conditions that are provided to the richest states and the Federal District,[7] a federal entity which is lobbying for higher education for all and it stands as the most favored entity nationally.

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[5] Mexico has an indigenous population of 6,913,362 distributed throughout the territory (INEGI, 2010).

[6] Mexico accounts a total of 5,739,270 people with disabilities. The highest percentage of national disability focuses on the inability to walk (58.3 %) and disability to see (27.2 %) (INEGI, 2010).

[7] The Federal District (DF) is a federal entity with special political status. As the headquarters of the Mexican federal government, it concentrates economic and political power. Nominally under the control of the federal executive, but since 1997 an elected official in the capital rules of the corresponding local government.

Table 46.1 Historical evolution of the national population at high school and university age

Age groups	1950	1960	1970	1990	2000	2010
16 to19	2,061,764	2,781,523	3,953,334	7,640,671	7,902,101	8,761,774
20 to24	2,299,334	2,947,072	4,032,341	7,829,163	9,071,134	9,892,271
Total	13,354,848	18,559,022	26,571,276	42,801,821	45,460,324	47,276,312

Source: Population census, INEGI

Table 46.2 School-age population (16–19 years) by state in 2000 and 2010

	2000	2010
Distrito Federal	642,949	583,118
Nuevo León	303,456	325,887
Coahuila	180,087	207,450
Chiapas	341,511	418,535
Oaxaca	282,549	317,728
Guerrero	259,266	290,239

Source: Population census, INEGI

Demand for education has increased with the massive expansion of the population in Mexico. The population groups have been distributed in the following manner. In 1950, Mexico had 13,354,848 school-age population, of which 2,299,334 were in the age range 20–24 years when reaching graduation. Sixty years later, in 2010, Mexico had 47,276,312 schoolchildren, with 9,892,271 in the 20–24 years range (see Table 46.1).

In this reporting framework, the states identified as being poorer reveal their educational reality, given the characteristics, conditions, and restrictions they faced historically. Here are some data. The percentage distribution of the school-age population, which ranges from 3 to 24 years, is as follows: Chiapas has increased demand for schooling from 2,014,435 (in 2000) to 2,295,041 in 2010; Guerrero had in 2000, a demand for education of 1,573,912 inhabitants and in 2010, this increased to 1,580,512; Oaxaca demanded spaces for 1,730,853 inhabitants in 2000 and 10 years later, there was a decrease to 1,691,868 (INEGI, 2000, 2010).

In the case of groups of interest for the present report, we note that claimant groups of high school education (those aged from 16 to 19) were as follows: in Chiapas, there was an increase from 341,511 in the year 2000 to 418,535 in 2010; in Guerrero, during the same decade, there was an increase from 259,266 to 290,239; in Oaxaca, in 2000, 282,549 demanded spaces, while in 2010, 317,728 spaces were demanded. At the opposite pole, the states that had a similar suit (Nuevo León) or less (Coahuila), except in the case of the Federal District which, although in 2010 reduced its population, there were more than half a million inhabitants of an age to attend to high school (see Table 46.2).

However, the levels of attention to the demand for the three poorest states that we analyzed are quite low, since none of them achieved the national average in the years reviewed, while in the richest states, they all reached the national average in

Table 46.3 Percentage of the population aged 16–19 years attending school by state and sex in 2000 and 2010

	2000			2010		
	Total	Men	Women	Total	Men	Women
Country	41.4	42.3	40.6	51.2	50.7	51.7
Distrito Federal	60.3	61.3	59.3	65.2	64.9	65.6
Nuevo León	43.5	44.2	42.8	50	50.4	49.6
Coahuila	41.3	41.5	41.1	52.2	52.3	52.1
Chiapas	33	37.5	28.8	43.8	46.3	41.3
Oaxaca	37.2	40.2	34.4	47.9	48.2	47.6
Guerrero	40.4	42	38.9	46.5	46.2	46.7

Source: Population census, INEGI

Table 46.4 School-age population aged 20–24 years by state in 2000 and 2010

	2000	2010
Distrito Federal	832,517	753,404
Nuevo León	391,235	401,723
Coahuila	223,857	230,132
Chiapas	361,994	438,019
Oaxaca	288,035	313,523
Guerrero	265,129	290,684

Source: Population census, INEGI

that year. That is, the percentage of the population attending school is higher in these states (see Table 46.3).

In higher education, the percentage distribution of the school-age population aged 20–24 years by state for 2000 and 2010 is as follows: in Chiapas, it increased from 361,994 in 2000 to 438,019 in 2010; Guerrero had a population of 265,129 in 2000 and 290,684 in 2010; Oaxaca, having a population of 288,035 in 2000, increased to 313,523 in 2010. According to the review, these states have a demand equivalent to that of the stronger states, with the exception of Federal District, which almost doubles the pregraduate age population (see Table 46.4).

The rates of attendance in higher education in poor states are very low. In all cases, these states are below the national average of 17.7 % in 2000 and 22 % in 2010. The three states are far from the percentage of the leader, Federal District, which was 36.3 % in 2010 (see Table 46.5).

The situation is confirmed when one identifies the total undergraduate population, that is, the data of the highest level of studies in the population over 24 years of age obtained at the country level. In 2000, 12 of 100 people had at least 1 year of graduation; in 2010, this increased to 17 in every 100. In this case, leadership is maintained by the Federal District, as, currently, 30 out of 100 have at least 1 year of graduation. In contrast, the poorest states show rates below the national average. In the case of Chiapas, in a span of 10 years, the proportion increased from 6.7 to 12.3 %; Guerrero, in 2000, 9 out of 100 had 1 year of graduation compared to in 2010, where this proportion reached 13 %; Oaxaca is last in this indicator, as, in 2000, only 6.5 % of its inhabitants had 1 year of graduation, but in 2010, this population increased to 10.8 % (See Table 46.6).

Table 46.5 Percentage of population aged 20–24 years who attended school in a state by gender in 2000 and 2010

	2000			2010		
	Total	Men	Women	Total	Men	Women
Country	17.7	19.1	16.4	22	22.8	21.3
Distrito Federal	31.6	34.2	29.2	35.3	36.3	34.2
Nuevo León	19	21.1	16.8	22	23.6	20.2
Coahuila	16	17.7	14.4	22.3	23.8	20.8
Chiapas	12.2	14.2	10.3	15.3	16.6	14.1
Oaxaca	14	15.8	12.5	17.6	18.7	16.7
Guerrero	15.1	15.7	14.6	17	16.8	17.1

Source: Gobierno Federal de México (2011). Population census, INEGI

Table 46.6 Percentage of population aged 24 years and over with a degree in higher education by state and sex in 2000 and 2010

	2000			2010		
	Total	Men	Women	Total	Men	Women
Country	12	14.5	9.8	17.8	19	16.7
Distrito Federal	22.1	27.2	17.6	30.2	32.6	28.2
Nuevo León	16.9	20.5	13.5	23.6	25.8	21.4
Coahuila	14.8	17.3	12.4	20.9	22.6	19.4
Chiapas	6.7	8.5	4.9	10.8	12.3	9.4
Oaxaca	6.5	8	5.1	10.8	11.9	9.9
Guerrero	8.9	10.6	7.4	13.1	13.7	12.6

Source: Population census, INEGI

Table 46.7 Evolution of educational coverage for the population aged 19–23 years

Cycle	Distrito Federal	Nuevo León	Coahuila	Chiapas	Oaxaca	Guerrero
1995–1996	29.5	20.9	18	5.9	9.2	11.8
2000–2001	43.3	28.9	26.6	13.1	16.6	20.7
2005–2006	46.9	33.4	28.7	15.2	19	20.6
2006–2007	49.2	34.9	29	15.7	18.9	20.2
2007–2008	50.2	35.7	30.6	16.2	19.1	19.5
2008–2009	54.1	36.9	32.3	17.2	18.7	19.3
2009–2010	57.2	38.2	32.7	18.2	18.4	19.1
2010–2011	65.4	38.7	34.2	18.5	19	20.9
2011–2012	68.8	40.4	35.6	19	19.4	22.7

Source: Gobierno Federal de México (2011). Fifth report of the government of Felipe Calderón, 2011

Next, we analyze the historical evolution in coverage on higher education and school age. Data by state show a significant rise over the past 15 years. States with higher rates of poverty substantially increased the coverage at this level. Chiapas went from a coverage of 5.9 % in the cycle 1995–1996 to 19 % for the 2011–2012 cycle, that is, it nearly tripled its coverage. Minor advances are shown by Guerrero and Oaxaca, as they doubled their coverages in the same period (see Table 46.7).

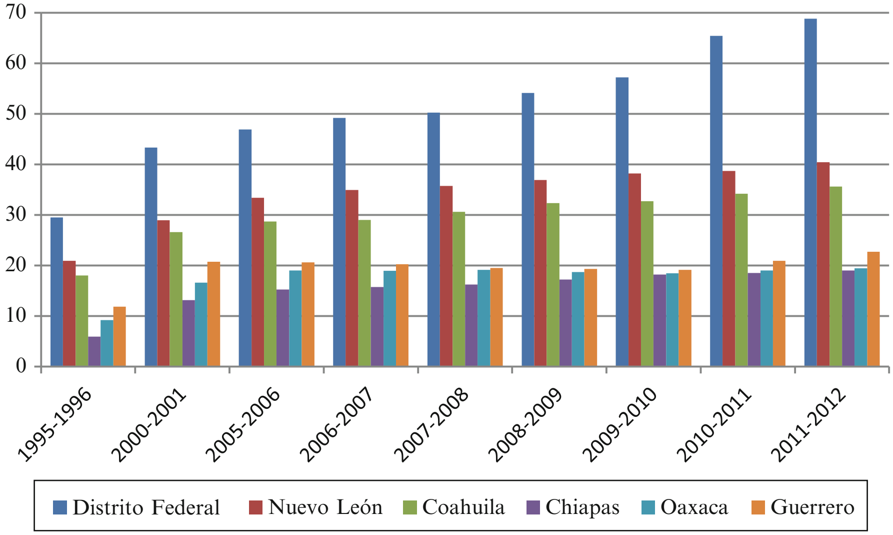

Fig. 46.4 Change in the percentage of population coverage of people aged 19–23 years (Source: Gobierno Federal de México (2011). Fifth report of the government of Felipe Calderón, 2011)

The same information shows the enormous gap between rich and poor states. Coahuila and Nuevo Leon have, in the last school year, coverage above 30 %. Coahuila has a rate of 35 %, while that of Nuevo León reaches over 40 %. The leader in the coverage of higher education is the Federal District with 69 %, which means that only 31 out of 100 people in that state had no access to education (see Fig. 46.4).

Attempts to strengthen the entry of Mexican youths into higher education have led to the creation and maintenance of different types of scholarships. The National Scholarship Programme for Higher Education (PRONABES)[8] encourages the retention of students by means of economic support; grants from the National Council of Science and Technology (CONACYT) are awards to support research training in postgraduate programs of high impact; there are other types of scholarships which are awarded by various Mexican agencies to train undergraduate and graduate students.

PRONABES scholarships can be seen as support for those students who seek to pursue economic conditions of graduate studies. While its approach is not mentioned,[9] it is clear that it serves to cover the cost of the opportunity of education for

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[8] Scholarships from PRONABES started in the 2001–2002 school year with the participation of all states and the four higher education institutions of the Federal Government (IPN, UAM, UNAM, and UPN). The fund's resources are provided by the Federal Government, state governments, and public institutions of higher education in equal parts.

[9] Grants from this program are intended to ensure that students in adverse economic situations and with the desire to excel (such as during further studies) can continue their education project at the top level in public institutions in degree programs or higher technical colleges.

Table 46.8 PRONABES scholarships by school year

e	2005–2006	2006–2007	2007–2008	2008–2009	2009–2010	2010–2011
Distrito Federal	20,235	23,702	36,194	40,076	61,584	78,358
Nuevo León	4,418	4,495	4,744	3,954	3,880	3,294
Coahuila	4,851	5,070	5,275	5,293	5,314	4,844
Chiapas	6,310	8,037	7,742	6,809	9,401	9,222
Oaxaca	2,396	2,251	4,057	5,878	5,610	5,812
Guerrero	3,603	4,088	4,032	4,852	4,132	4,350

Source: Gobierno Federal de México (2011). Fifth report of the government of Felipe Calderón, 2011

those students who pursue their studies that are prevented from earning an income to support their families, that is, to offset the income they could have had if they were working instead of studying.

PRONABES scholarships are aimed at more depressed social and economic sectors nationwide. Its application and competition takes place in all states. The analysis we performed allows us to establish a set of differences between rich and poor states that we have outlined. First, it highlights a slight change in the support accorded to the rich states. In 2005–2006, these states received a high number of scholarships (only Chiapas received more than Coahuila and Nuevo Leon). By the 2010–2011 cycle, the three poorest states are able to overtake Coahuila and Nuevo Leon. However, over time, the dramatic growth is noticeable in terms of scholarships provided to the Federal District. In only five school years, more than 58,000 scholarships were earned by their students (see Table 46.8).

In comparative terms, the three poorest states show an increase in support. Oaxaca has been the state which benefited the most, as grants increased from 2,396 in 2005–2006 to 5,812 in the cycle 2010–2011 (an increase of 142 %); the other two states have not yielded generous benefits. Chiapas has achieved a 46 % improvement in the number of scholarships for the last five cycles, but Guerrero has only obtained a 20 % increase over the same period of time. In the case of the three richest states, Coahuila remains at virtually the same level of support over the past 5 years. Nuevo Leon has seen a decrease in the number of scholarships, going from 4,418 to 3,294 (25 % less). A special case is the Federal District, increasing from 20,235 to 78,358 grants (a 287 % increase) in just 5 years (see Fig. 46.5).

The last dataset we present are the fellowships awarded by the government for the training of researchers through postgraduate study. CONACYT grants have been awarded for 40 years. This program is designed to support people in undertaking high-level studies in academic institutions of excellence, both in the country and abroad. The objective is to contribute to the training of scientists and technologists of the highest level and increase scientific and technological capacity in Mexico. The training of human resources for research and development in Mexico are practically taken by rich states. It highlights the fact that, in 2001, the state of Guerrero received only a single a scholarship, while the Federal District had 4,603 scholarships for students (see Table 46.9).

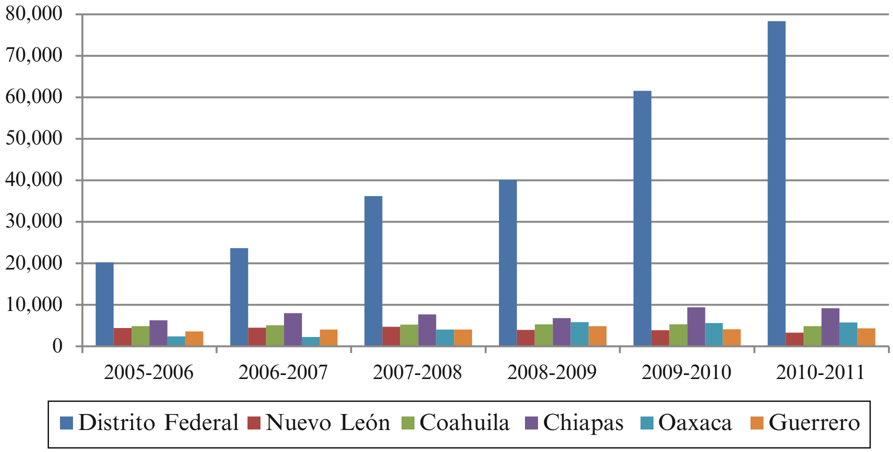

Fig. 46.5 PRONABES grants evolution (Source: Gobierno Federal de México (2011). Fifth report of the government of Felipe Calderón, 2011)

Differences between states are evident. Students of Coahuila and Nuevo Leon have greatly benefited over the past 10 years, since they have achieved an increase of those who access them. Coahuila has grown from 116 students with scholarship in 2001 to 887 in 2011, an increase of 664 %. Nuevo Leon also has had a good increase, as numbers went from 253 to 1,897 in the same 10 years; its increase is 649 %. But the most notable increase is the Federal District, since, in 2001, it had a high number of scholarships (4,603), and this tripled in 10 years, reaching 12,731 students with scholarships. The differences are best appreciated in Fig. 46.6.

The data presented allow us to understand the high degree of inequality existing in Mexico. This is expressed by the enormous weight of the Federal District in obtaining and consuming resources for higher education. Similarly, via documentation, we have shown how the state of Mexico receives more support than poor states, although demand for educational services is equal to or greater than rich states.

These characteristics should allow the placing of higher education in an educational context that is witnessing a rapid growth of scientific discovery, with an impressive advance of information technology and communications (ICT) to be applied in the educational context worldwide. However, it must also be understood that the context of inequality in Mexico means a barrier to reach a higher level of collective life in which to enjoy the benefits of scientific and technical progress, because, in a context of growing inequality, the consequences of this situation can lead to a social demarcation (and not just territorial) of boundaries, the growth and acceptance of interpersonal differences.

This level of inequality and lack of opportunity should be part of national priorities and international agendas, as this type of phenomena is important because their impact is unknown (directly or indirectly) on the issues that have been privileged in

Table 46.9 Graduate scholarships awarded by CONACYT

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Distrito Federal	4,603	4,735	5,665	6,136	7,202	7,642	8,800	11,461	12,678	11,879	12,731
Nuevo León	253	285	326	401	427	475	795	1,202	1,649	1,770	1,897
Coahuila	116	133	151	300	410	433	461	404	500	828	887
Chiapas	60	95	94	89	108	80	422	202	218	292	313
Oaxaca	12	13	15	62	61	65	61	51	80	229	245
Guerrero	1	1	1	4	46	77	50	48	56	49	53

Source: Gobierno Federal de México (2011). Fifth report of the government of Felipe Calderón, 2011

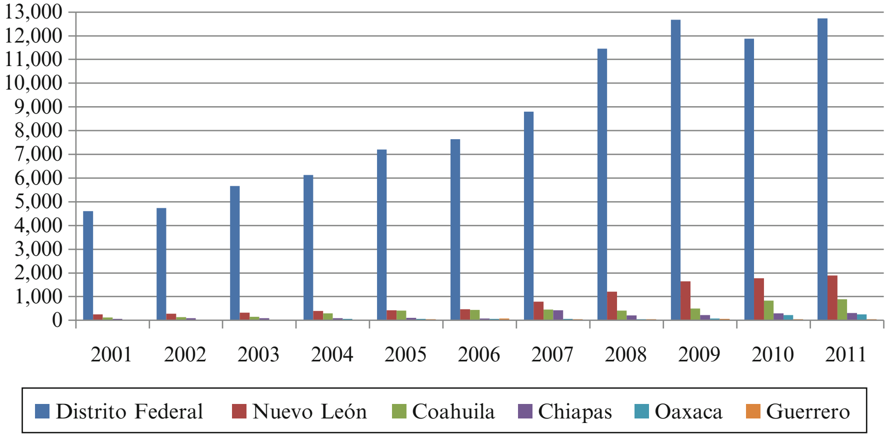

Fig. 46.6 CONACYT grants (Source: Gobierno Federal de México (2011). Fifth report of the government of Felipe Calderón, 2011)

the educational agenda: economic competitiveness and market share, sustainability, identity within globalization (including information, trade, and people and their cultures), equity, and, increasingly, the role of public institutions, including educational institutions.

The existing social structure we have, including the identity and cohesion in society and their understanding and acceptance of other societies, is largely created in schools. Educational institutions are one of the few trusted entities that may provide opportunities for socialization subjects and escaping poverty through learning. School education helps give meaning to and promote the sustainability of these changes, in particular, through life-long learning. In this regard, we believe that it is necessary to nourish the high expectations of a change in every country in the shared work of officials and scholars from institutions of higher education, who can lead the processes of learning and managing social change.

Adding to the expectations placed on education to promote equity and social justice, we find pressures of the approaches promoted by international agencies to ensure educational reform worldwide. The approaches of international agencies (OECD, OEI, World Bank) make clear the presence of a particular political leadership to drive change in higher education institutions, which has a huge impact on the kind of research that is legitimate and the notion of social transformation that is induced, as we have noted in the two preceding paragraphs.

Epistemology of Research and Social Transformation

One of the most pressing educational issues is the configuration of educational research in the way that it has become an international agenda since the last century. The OECD (1995) explored the trends, issues, and challenges of educational research and development. The agency acknowledged, among others, four generic problems that limited the value of educational research. The first was the fragmentation, not only among political actors, policy makers, and practitioners, but also among researchers themselves. Second, the irrelevance of the issues set. The third was low quality and efficiency because of the resources invested and the products were meager. The fourth was the low applicability in educational institutions, which was attributed to the poor dissemination of results.

The reconfiguration of the research agenda for Latin America must pay special attention to the issue of educational leadership, as has already been confirmed to be an important factor in the success of educational institutions.

This leadership is especially important because of the impact of principals on student achievement, which demonstrates the influence of this work in academic outcomes through the proper organization of teachers and the setting of relations with society and families (Bell et al., 2002).

It is clear that, given the enormous gap that has been generated in Latin America, the educational leadership demands needs to incorporate issues such as providing education to promote social tolerance at a time of increased pluralism and multiculturalism. Similarly, it is important to meet the needs of growth and development within the context of economic and social gaps that have been generated with neoliberalism and, finally, it must include the educational agenda in the field of government, especially in reference to the responsibilities of governance that have been acquired with the multiple reforms driven by different sectors. In the same way, it is important to link education and research development with the type of preparation required by the government commitment to democracy, equitable development, and increased social capital and its citizens.

We have considered that the issue of educational research, leadership, and transformation is a subject that passes through the newly minted education policies in the countries of Latin America. In previous writings (Ramirez & Ruiz, 2011), we considered necessary a set of dimensions, linked to epistemology, linking higher education and social transformation. At one level, it is intended to analyze the instances that act on the higher education systems. This is a reflection on the structure, processes, and relationships that determine the general orientation of national systems of higher education. Relevant questions about it are: Who defines the problems for higher education to attend and which tools should be used? What theories support the defined problems?

To answer the previous question would imply taking into account the ideology and setting of the educational agenda. It may also be useful for discovering and criticizing the models and theories that explain the problems and activities that create a collective perception of the problems. Why do they choose these problems and not others? How do you define the problems and policies for resolution? With the search for answers at this level, we generate an explanation of how and why the decision-making happens, and how the analysis of problems structures the decision-making process in the academic leaders.

Another aspect to consider is the presence, relationship, and influence of businessmen in international organizations for educational policies that are really needed to form a framework to promote greater equity (Slaughter, in Torres & Schugurensky, 2001). At a second level, one can seek to understand the structure, processes, and relationships that determine the orientation of the institution. This is intended to identify and characterize the processes by which institutional change takes place, that is, identify how knowledge is produced in order to structure the practice of politics. How are educational policies in the institutions operated? How is their transition to the institutions facilitated? Are the issues raised by researchers and specialists considered on the agenda? When asked of their responses, we explore the implementation and maintenance of educational policies.

Outstanding issues at this level also include: Ways to influence the entrepreneurs and capitalists of education in the decision makers in institutions; Alternatives of resistance or acceptance of the educational agendas of institutions and, if this situation has not diminished, the social commitment of educational institutions. What is analyzed is the acceptance or rejection of the demand function for public universities to the detriment of the historical conception of the university; Conception and exercise of university autonomy; New forms of government acquired; The nature and impact of the new bureaucracy cordoned off the axis of planning – evaluation – accreditation, decisions to fulfill a social responsibility as an institution.

For a third level of analysis, one can explore the structure, processes, and relationships that define the new practices in the institutions: The belief systems and interests of individuals to accept, resist, or give consent to the projects and emerging education policies; Identities arising under the guise of competition. The scope of an academic culture based on individualism and competition among students recreated.

Conclusions. The Role of Transnational Education and Research Networks for the Construction of Citizenship and Fighting Social Injustice

To understand changes within universities, a deep reflection on the mission of the university and, therefore, relations between the university and society are necessary. Motivation in many countries to participate in processes of regionalization have been linked to trade negotiations to determine certain "social" objectives or to obtain arguments to use within their nations in an attempt to show a more human face of regional economic integration against the growing criticism of citizens (Gudynas, 2004a, in Feldfeber & Saforcada, 2005: 19). It is here where researchers are called to address a social responsibility as members of an institution of higher education to conduct research on controversial topics or the shared goals and resources of business organizations or international organizations, because of possible distortions and misapplications of the results. Thus, the responsibility does not end with the presentation of technical reports, but, instead, with the review of the impact of their research results. In this line, the Ibero-American Area of Knowledge received in 2010 in Guadalajara from *Universia*[10] the commitment to allocate 60 million Euros over the next 5 years for student mobility and the training of young researchers. Considering the source of this support, and the widespread presence of *Universia*, one realizes the magnitude of the goals and limited opportunities that are financed with government resources or institutions of higher education themselves. It also realizes the complexity of the required actions, whereupon it is highly recommended to create social observatories on different thematic issues, actions of governments, and knowledge transfer from universities to society.

The problem of inequality and social injustice that has been accentuated by the incursion of neoliberal policies is not a problem that is exclusive to Mexico. There is evidence that it is presented throughout the regions of Latin America. In this final section, we will refer to the relationship between translational research and the fight against social injustice.

We consider that we are in a transcendent point in time for research. The importance that the U.S. has granted to the research agenda has been leaked to the point that the American Educational Research Association (AERA) unanimously approved a resolution (AERA, 2003), which recommends to keep under special surveillance the questions that guide the research methods and, thus, improve the approach to problems. In essence, it should be to formulate what is worth knowing, how to know, and make the new knowledge produced to address the inequalities and foster a culture of citizen participation, having the expected effect.

This approach to the knowledge of social problems can only be followed if one is able to interpret social research as an academic commitment to exercise leadership for social transformation. For this, it is essential to recognize that social leadership requires the action of the officials who run educational institutions, and that their actions are of high impact inside and outside the institutions, as has been documented that leaders play an important role and make significant contributions through the good organization of teachers. Transmitting and exercising leadership by teachers is also essential, for it may be necessary to make changes to the organization or the substantive functions. These actions are, in fact, a construction of powerful teaching and learning, strengthening communities, and the development of educational cultures (Leithwood & Riehl, 2003).

So far, we face the challenge of understanding that justice is part of a social construction that is composed of educational practice, which is why we cannot assume that equity and social justice have fixed meanings, as these are manifested only when educational practices propose social transformation through the practice of educational leadership that responds to the everyday realities and, under the principles of no discrimination based on social, economic, and political background, race, or gender, are created in each school (Bogotch, 2002).

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[10] *Universia* is a network of universities integrated by 1,232 institutions of 23 Latin American countries, representing 14.3 million teachers and students. It was founded in 2000 with the support of 35 Spanish universities, the Conference of Rectors of Spanish Universities, and the Higher Council for Scientific Research. Between 2000 and 2005, it was established in 11 Latin American countries, completing its presence in all countries by 2010. The network promotes activities, products, and services to encourage joint projects between universities and explore the potential relationship between academia and industry. http://www.universia.net/nosotros/quienes-somos/

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Chapter 47
Dilemmas and Challenges in Forging Social Cohesion Through Education: Emerging Struggles in Social Justice in Post-conflict Education in Sri Lanka

Damaris Wikramanayake

Sri Lanka is a small island in the Indian Ocean with a multiethnic and multireligious population. From 1945, Sri Lanka has provided free education for all children from primary to tertiary level. Since the 1990s, free education has been supplemented by free textbooks, free school uniforms, and a midday meal for children in poorer districts. These efforts have sought to equalize the opportunities afforded to children of Sri Lanka and ensure equity in access to education. The population of Sri Lanka is made up of Sinhalese (74 %), Tamils (14 %), Muslims (7.6 %), Indian Tamils (4.6 %), and Burghers and Malays. Sixty-nine percent of the population are Buddhists, 7 % are Hindus, and approximately 6.2 % are Christians. As a result of the free education policy in 1945, Sri Lanka, though a developing country, has achieved a high level of human development and also maintained a high literacy rate. Yet Sri Lanka has been embroiled in a civil conflict from 1983 to 2010, and education has failed to inculcate values of peace and tolerance in the future generation. With the end of the war, the country needs to focus on bringing about social cohesion and justice and moving towards achieving national solidarity and a culture of peace. The long period of war has caused mistrust and intolerance among ethnic communities. Thus, Sri Lanka presents a unique case for a study on social justice and social cohesion.

In 2008, education policy leaders in Sri Lanka took the crucial step in preparing a national policy on social cohesion and peace education. The many issues of conflict and the lack of social harmony in the country deemed a national policy on social cohesion and peace education necessary. Although there were many initiatives already being carried out in the country to promote peace and social cohesion, there was a general lack of coherence and coordination among the programs. Recognizing the role education could play in the promotion of social cohesion and

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in the growth and development of future citizens, policy leaders made the decision to strengthen this role. The policy identified seven strategic areas through which social cohesion could be developed: (1) curriculum, (2) teacher education, (3) second national language (2NL), (4) whole school culture, (5) integrated schools, (6) cocurricular activities, (7) and research (Ministry of Education [MOE], 2008, p.iv). A special unit, the Social Cohesion and Peace Education Unit (SCPEU), was formed in the Ministry of Education to oversee and coordinate all the policy initiatives.

The policy was prepared to address the problems of intercultural disharmony, ethnic conflict, the lack of tolerance, the lack of trust among different communities, problems in communication, the inability to communicate in another's language, lack of protection of the rights of others, an increase in violent behavior, and the improper distribution of power and resources (MOE, 2008). Through these initiatives, the policy aimed to produce the "desired citizen," who is one who can live in a multicultural society, respects diversity, values and tolerates other cultures, communicates well in several languages, is politically enlightened, and has a global vision (MOE).

This chapter will focus on education leadership as demonstrated by the vision of policy leaders in Sri Lanka in their attempt to promote social cohesion in education through various policy initiatives. It begins with a background to Sri Lanka and a description of the National Policy for Education for Social Cohesion. This will be followed by a discussion of the concept of social justice and social cohesion as a vital component for its implementation. The chapter will go on to discuss the dilemmas and challenges that education policy leaders face in the promotion of social cohesion in Sri Lanka.

Social justice is a concept that is hard to define. Social justice has been defined in different ways based on factors ranging from political interests to social philosophy. According to Michael Novak, "Social justice rightly understood is a specific habit of justice that is "social" in two senses. First, the skills it requires are those of inspiring, working with, and organizing others to accomplish together a work of justice. ….. The second characteristic of 'social justice rightly understood' is that it aims at the good of the city, not at the good of one agent only" (Novak, 2000). Social justice is embedded in the morals and values of societies and draws from the codes of morality rooted in each culture. Theoharis (2007) states that "social justice supports a process built on respect, care, recognition and empathy." These particular aspects of social justice are very relevant to Sri Lanka in the aftermath of the civil war. Mistrust between communities and a lack of respect for other ethnic groups has been fueled by years of conflict. Social cohesion is the ongoing process of creating a community of shared values and challenges and equal opportunities for all ethnic groups. Social cohesion is the key that holds diverse groups together in a common bond of trust and respect. Jenson identified five dimensions of social cohesion: belonging, inclusion, participation, recognition, and legitimacy (Jenson, 1998). Only when these five dimensions are present in a society can social justice be truly achieved. Social cohesion then is an important component for the functioning of social justice in Sri Lanka.

From an equity point of view, Sri Lanka seems to have struck out on the path for social justice in seeking to give her children a free education, and ensuring economic difficulty would not hamper that learning by providing uniforms and textbooks and a midday meal in poorer schools. In the aftermath of war, education leaders (policy makers) have realized the importance of promoting national unity and solidarity among the different social groups in the country and recognized the role education could play in this. In response to this realization, education leaders in Sri Lanka have initiated strategies to promote social cohesion through the school curriculum, textbooks, teacher development, cocurricular and extracurricular activities, the organization of schools, and language policy. How successful these measures have been will be seen in the discussion that follows. Yet, although policy makers had the vision to initiate policies that would enhance social cohesion in education and in that sense ensure social justice was practiced, a lack of understanding of the realities and the shortcomings in the system resulted in problems with implementation.

The promotion of social cohesion in education, however, causes education policy leaders to face several dilemmas and challenges. Some of these dilemmas and challenges are outlined below.

Dilemmas of Education Policy Leaders

The initiation of measures to promote social cohesion and social justice necessarily involves ensuring the equity of access and resources in education to all groups of children. In making decisions on policy for the promotion of social cohesion in education in multiethnic and multicultural societies, policy makers must take into account certain factors. Often the first and immediate focus of policy makers is on identity, and groups, marginalized because of difference, be it due to ethnicity, religion, economic, or political factors or disadvantage in some way. This strong focus can sometimes serve to preserve those very same disadvantages and inequalities and presents education policy leaders with several dilemmas.

Ethnic Diversity and National Identity

Many developing countries are faced with tensions and dilemmas arising from the complex nature of their ethnic and linguistic composition that, until relatively recently, few of the industrialized countries have had to face. The increasing ethnic diversity in countries around the world and the continuing demand for cultural recognition and rights have forced governments to try to construct new definitions of citizenship and national identity (Banks, 2004, p.296). Citizens in an ethnically diverse community should be able to maintain their cultural traditions while participating in the achievement of national goals. Governments then ought to be able to "provide opportunities for different groups to maintain aspects of their community cultures while building a nation in which these groups are structurally included and to which they feel allegiance" (Banks, p.298). One of the dilemmas facing governments in many multiethnic and multilingual societies, therefore, is how to achieve a sense of national identity, without at the same time destroying the existing ethnic and cultural identities of different groups that make up the whole of society. According to Banks, there should be a delicate balance of diversity and unity in any democratic state. Recognizing disadvantaged groups and compensating for their disadvantage through various reforms can also serve to preserve those same group identities. In Sri Lanka, this can apply particularly to students in estate schools that lack the basic facilities and resources that are common in other schools. Policies that grant these schools extra resources can also serve to ensure they are continually classified as "estate schools" as separate from other schools.

When all citizens in a nation share the same common goals and values and are committed to the progress and prosperity of their nation, then that country is more likely to develop economically and politically as national solidarity is important for economic development. In multicultural societies, a national identity that all groups can feel a part of is an important aspect for the promotion of social cohesion and the progress of the nation. Sri Lanka needs to focus on building such an identity that includes all ethnic and religious groups. Until all groups, whether they be defined by ethnicity, religion, language, economic, or political status, can feel they belong and are respected and valued citizens of the country, there will not be true social cohesion. At the national level, policy makers in the recent past have made several references to building this national identity, particularly in the aftermath of the civil war.

The national policy on social cohesion in education in 2008 proposed that every citizen ought to learn a national language other than his/her own and also gain competency in English an international language, vital for science and IT (MOE, 2008). In 2007, the policy decision requiring all government officials to gain proficiency in the second national language within a period of 5 years was made. As we have seen, the policy also identified attributes of the "desired citizen" who will be a product of the initiative Education for Social Cohesion. Education can thus help to forge a national identity that will bring all diverse groups together, if used in a positive way.

Challenges of Education Policy Leaders

There are also several challenges that education policy leaders must face in the promotion of social cohesion in education. The challenges arise from having to move from an idealistic concept of "perfect inclusion" to an inspirational yet more realistic set of policy measures geared towards a society for all. How to show an appreciation of all ethnic cultures and yet cultivate a spirit of national solidarity and cohesiveness is the necessary focus for policy makers.

Textbooks and Diversity

Education policy leaders face a major challenge in trying to combine a recognition of and respect for the diverse identities of students with a concern for greater equality. The promotion of social cohesion in education requires a lot more than a mere recognition of identity. Identities are constructed in a process set within a network of power with differentiated access to economic, social, and cultural resources. Sometimes people identify themselves with a group, through religious, ethnic, or political affiliation, and there are various dimensions to an individual's identity. Policy makers must also be aware that if we are interested in affirming people's identities, then we must be prepared to accept them for who they think they are and not thrust our own classification on them. Recognizing someone's identity means we see them as they want to be seen. True bonding requires us to treat these people as individuals, not categories or groups, and to listen to their stories and learn from them. Assimilation alone is no longer enough; there must be accommodation as well. In this sense, curriculum too must reflect the stories of all groups in society.

Rather than design a whole new curriculum to promote social cohesion and peace concepts in schools, policy makers in Sri Lanka decided that social cohesion and peace concepts should permeate the whole school curriculum. In some subjects, this was easier to achieve than others. History, on the other hand, is a very important subject for the promotion of social cohesion, and the subject can be used to show the intermingling of the two main ethnic groups during the long course of the country's history. Yet History textbooks and curricula for grades 6–11 show a lack of sensitivity towards ethnic minorities. History is told from the stance of the majority race and topics are selected accordingly. Previous studies have pointed out these same biases (Rasanayagam & Palaniappan, 1999; Wickramasinghe & Perera, 1999). Minority races are often presented in a negative fashion. Characters from the majority race are depicted as heroes. Field investigations undertaken by the writer revealed that of a sample of History teachers in schools in the Eastern Province,[1] all but one indicated that the curriculum was unfair and biased with about 80 % of respondents stating that the history of minority cultures was not addressed.

According to Greaney (2006), there are eight ways in which textbooks can undermine regard for diversity and tolerance: narrow nationalism, religious bias, omission, imbalance, historical inaccuracy, treatment of physical force and militarism, use of persuasive techniques, and artworks (pp.50–51). With the exception of the artworks, the Sri Lankan history textbooks appear to have examples for each of these categories. The way in which minority ethnic groups are presented in textbooks is an important factor in the promotion of social cohesion in education (Heyneman & Todoric-Bebic, 2000). Students all over the country read these textbooks every day, and if textbooks are biased in any way, students can be easily influenced. It is therefore essential that textbooks are scrutinized for evidence of bias or prejudice towards any particular culture or religion. Educational policy leaders thus have an important task in ensuring these biases are removed. In the past few months, however, some improvements have been seen in this area which is an indication that authorities are moving in the right direction. Review panels in the Education Publications Department have made changes in some of the textbooks to eliminate these biases.

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[1] Largely minority Tamil and Muslim population.

As History is a compulsory subject for the OL examination, there is an urgent need for a re-scrutiny or revamping of the curriculum, making certain that the stories of all ethnic groups are presented and that all groups are represented in a positive manner. Only then can all ethnic groups truly feel that they belong. It is also hard to discriminate against a particular group of people if their histories are an essential part of the school curriculum. Recognition also causes students to feel more engaged and focused on lessons. It is evident that curriculum and writing panels for the subject of History lack sufficient representation from minority communities. This is a leadership issue. National Institute of Education (NIE)[2] sources state that there is a difficulty in obtaining the assistance of qualified subject specialists from the minority groups. The continued conflict has caused mistrust between ethnic groups, and this prevents people coming together and working on common goals. Specialists from minority groups in turn state that their ideas are not considered. Policy makers must try to rectify this. There is a need to work out how trust can be rebuilt between communities. Policy leaders must also ensure that all voices are heard and accepted in curriculum and writing panels.

Extracurricular Activities

In post-conflict situations, education is often required to address additional issues like peace education, which has become a kind of generic term for formal and informal educational activities that promote peace and tolerance and respect for diversity in schools and communities. Following civil war and conflict, there is usually a plethora of activities, planned by governmental and nongovernmental organizations and multilateral agencies, that are implemented in an ad hoc fashion. This presents another challenge to education policy leaders to find a balance and provide some leadership and coordination between these activities. Peace education activities that are linked to wider peace building in the community are more likely to make an impact on student behavior than forced attempts to link schools that are in alienated communities.

Education policy leaders in Sri Lanka nominated that extracurricular and cocurricular activities could be one of the strategic areas for the promotion of social cohesion, and educational leaders at the Social Cohesion and Peace Unit have spearheaded programs in this area. The enthusiasm displayed by the officers in this unit is the reason for the resounding success of these programs. This is the component that has had the most success in building trust and bonds between students (and teachers) of diverse ethnic groups. The programs planned by the unit also involved educational authorities at the provincial, zonal, and school levels.

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[2] The institute responsible for curriculum development and teacher training.

One of the programs, *Denuwara Mithuro* (Pals of two cities), begun in 2007, brings together 200 students and some of their teachers from both Tamil-speaking zones and Sinhala-speaking zones in a 7-day program of fun-filled activities. A quick brushup course on basic language ensures that students make friends and have fun. The students are hosted to lunch by the community and are entertained with traditional songs and dances. There have been 7 of these student friendship programs to date, involving 15 zones and 150 schools.[3] The programs, while fostering social cohesion, were not expected to be an end in itself but were counted upon to be the beginning of a long relationship between the schools and students. In this, again the organizers have been overwhelmed by the enthusiasm and appreciation shown by the participants in the programs. Most students had not mixed with students of other ethnicities before and were amazed at the degree of acceptance and friendship they were shown. The program has also seen the creation of student leaders, who have enjoyed participating in these programs and who now want to share their experiences with others in their schools and host a similar program for their new friends. The precise impact of this program is revealed by the fact that students continue to be in touch through letters and greeting cards and even through Facebook.

However, although these programs have brought together a large number of children from diverse ethnic groups in friendship and been a huge success, the unit is uncertain about future funding and this could hinder the development of more programs. According to the Policy for Social Cohesion, the unit, which was established in 2008, would have control over all the strategic areas for the development of social cohesion. But this has not happened and the unit does not even have control over the funding of its own programs. The unit today has lost its original status and now comes under the direction of the Director of Cocurricular Activities. All stakeholders are not convinced of the necessity of this unit. Some state that the war is over, and therefore there is no need for programs on social cohesion. Changes in leadership often cause these problems. Leaders must ensure there is continuity of ongoing programs even though there may be changes of personnel in key places.

These successful programs are in danger of petering out due to a lack of resources and support and give rise to the type of leadership issues and challenges that is often found when what appear to be excellent policies are implemented without the required resources in place and without all stakeholders being on board. At a field level in this case are a group of highly motivated education officers with a successful model which they are unable to replicate or expand due to a lack of support. Policy makers need to deal with this issue and ensure the continuing success of the activities of this unit.

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[3] There are 97 educational zones and 10,400 schools in the country.

Language in Education

In ethnically and linguistically diverse nations, often issues arise over the subject of language. Language is at the center of ethnic identity and recognition of language in the administration, the judiciary, and in education is crucial in indicating the acceptance of ethnic and religious groups. Coombs (1985) has observed that "the choice of language of instruction is one of the least appreciated of all the main educational problems that come before international forums" (cited in Watson, 1994). In many postcolonial states, governments vigorously promoted local languages in place of colonial ones (Bray & Koo, 2004). Often the choice of a single national language was made despite the existence of many languages, as in Sri Lanka. Everywhere the change to a national language had implications not only for administration and governance but for education as well, and often this last factor is not given enough consideration in the political decisions on language (Wikramanayake, 2009).

Language has always been a sensitive issue in Sri Lanka because of the diverse ethnic and religious groups in the population. Since independence in 1948, language has been the cause of ethnic tensions. Feelings of nationalism rising after independence caused English to be removed as the official language of administration and to be replaced by Sinhala. Although both Sinhala and Tamil were to be made national languages, in practice, only Sinhala was. This caused many grievances to the Tamils.

Education policy leaders in Sri Lanka made two very important policy decisions to further promote social cohesion through education: the teaching of the second national language (1999) and the teaching of English as a second or link language (1997). Learning of a second national language is a popular policy reform in countries that wish to build national solidarity. In Sri Lanka too, it was decided to introduce learning of the second national language in schools, requiring Sinhala-medium students to learn Tamil, and Tamil-medium students to learn Sinhala. The subject was first introduced in 1999 to students in grades 6–9 and made compulsory. In 2001, it became an additional subject for the GCE OL (grades 10–11). In 2007, it was introduced as an oral subject from grade 1 and was made an optional subject for the OL examination. While this seems an excellent reform to foster social cohesion, tolerance, and acceptance of diversity and is crucial to a multiethnic, multireligious society such as Sri Lanka, the system lacks the necessary teachers and resources to carry it out. The second national language ought to be taught to all children in all schools as part of the curriculum. But this is not the case because of the shortage of teachers trained to teach the subjects.

At present, only approximately 45 % of all schools teach the second national language. Approximately 16,000 students offer Sinhala as a second national language at the OL examination, but only 3,000 offer Tamil. Although the number of students selecting the subject at the OL is rising, there is a severe shortage of teachers to teach both Sinhala and Tamil as second languages. Often teachers, with other subject specialties, are made to teach the subject, and they resent this. The National Policy on Social Cohesion sought to remedy this situation by introducing a policy for the teaching and learning of the second national language in schools and teacher education institutes, thereby increasing the number of teachers competent to teach the subject. But no policy has been made yet on the teaching of the second national language, and the numbers of teachers have increased only marginally.

According to the Department of Statistics, only 94 schools in Colombo offer teaching in the second national language, and there are only 64 teachers in total to teach approximately 30,500 students. In the whole island, there are only 846 second national language teachers and 2,046 schools that teach the subject (Ministry of Education, 2009). Of course, teachers who have been recruited to teach another subject and were also teaching the second national language would not be counted here. Anyway it is apparent that there are great shortages in the numbers of teachers available. This reveals that education policy leaders, while making the right decisions in terms of fostering social cohesion, do not take into account the lack of resources, human resources, or the time needed to plan for decisions like this. Policies thus fail because the leaders down the line have not got the resources to sustain it. Often policy leaders legislate from above without taking into account the reality of education practice.

A similar situation is observed with the learning of English as a second language. English is the language of Science and of IT. It is also important both as a communication link between the two major communities and as an international language. English is taught as a second language from grade six onwards and is regarded as a core subject for the GCE Ordinary Level (OL) Examination. But there is a severe shortage of English teachers in the schools. Most rural schools in disadvantaged areas have no English teachers. Yet students from these schools must sit the examination in English at the OL and fail, because they have not had a single lesson in English.

The policy of bilingual education was introduced in 2001. Bilingual education refers to education in the mother tongue and English. This gives students the option of studying a few subjects in English while studying in the Sinhala or Tamil medium. Schools that had teachers proficient to teach in English were permitted to join the bilingual education program. This program was introduced as another way in which to get students to be more conversant in English. There is again a shortage of teachers capable of teaching in the English medium, and only a limited number of schools offer the option of bilingual education. However, the demand from students is strong and bilingual education is expanding in the country. Often the children demanding English-medium education come from English-speaking backgrounds. Schools feel compelled to cater to this demand as they might otherwise lose their students. Schools are also not allowed to teach the subjects they want in the English medium, as the Department specifies which subjects must be learnt in the mother tongue – the mother tongue is understood as being only Sinhala or Tamil, which are the languages of the majority races. English is not considered as the mother tongue because only a very small percentage use it as a first language. While the policy could be very useful in the promotion of social cohesion, leadership exercised at the next level directs the way the policy should work.

Teacher Training

Teachers are the most valuable component in the promotion of concepts of social cohesion and the acceptance of diversity. They can be viewed as potential agents of social change. Teachers, as educational leaders, also have a cardinal role in imparting the subject matter of a curriculum. How teachers do this and the attitudes conveyed by the teacher have a great impact on the child. Therefore, it is important to ensure, particularly in a post-conflict situation, that teachers have been trained both in the concepts of social cohesion and peace and in the imparting of these to students. For finally, it is the manner in which these values are taught and the behavior modeled by the teacher that has a profound effect on students' learning. "As a group, teachers wield significant influence over successive generations of young adults through a combination of the way they teach values, the selection (and omission) of values and the manner in which the selected values are translated for students and subsequently evaluated" (Print, 2000, p.12).

Since classrooms around the world now contain a more heterogeneous mix of students from diverse ethnic cultures, teachers are required to acquire new knowledge and skills that help them to work in multicultural settings and to develop an understanding of the value of diversity and a respect for difference. This brings new challenges to policy makers who have to improve the quality of teacher education to incorporate these new requirements and plan policy initiatives that will continue to enhance teacher skills and performance. No initial teacher training course can provide a teacher with all the skills required during his/her career. The demands on the teaching profession are evolving rapidly, and policy makers must decide on actions that would give the profession a much needed boost. Recognizing this, policy leaders in Sri Lanka have included teacher training as part of the policy for the promotion of social cohesion. However, this has remained mere rhetoric in the Sri Lankan context.

Although social cohesion and peace education is a component in the curriculum of teacher education programs in the country, according to the MOE, unfortunately, the teacher educator is not always sufficiently competent to impart these concepts to the teacher trainee, which means that these values do not reach the classroom (MOE, 2007). In-service training of teachers stresses more on the content areas of the subjects. Therefore, the concepts of peace and social cohesion are not passed down to the students as the teacher is not always aware of them (MOE). A dedicated focus on the content of the training teachers receive in terms of aspects of social cohesion is necessary if the results are to be achieved. Policy leaders must ensure that initiatives are carried out down the line.

The Education for Social Cohesion (ESC) program of the Ministry of Education was implemented in 2005 with the cooperation of the German Technical Corporation (GIZ). The program supported the Ministry's efforts in improving the services in the areas of peace and value education, language education (both second national languages and English), disaster safety education, psychosocial care, and programs for disadvantaged youth. The first phase of the project focused on training specialist staff and educationists at the Ministry, the NIE, the National Colleges of Education, and the teacher training centers and on building capacity in teacher pre- and in-service training for the components of ESC.

However, the baseline survey directed by the Ministry of Education and the NIE in August 2010 demonstrated that peace and value education was taught in only 50 % of the schools in the survey and that a significant number of teachers had not had any training in the past 5 years, which indicates they had not been exposed to concepts of ESC (Ministry of Education [MOE] & National institute of Education [NIE], 2010). Although 80 % of the teachers interviewed stated that they understood the concepts of peace and value education, only 24 % were able to give a valid response to questions asked (p.24; Wikramanayake, 2011, p.19). In addition, the survey revealed that over 40 % of second national language teachers rated their ability to speak the language as low, and many of the schools lacked sufficient teaching staff for the components of ESC. The survey also reported that a large number of teachers who had received training were unable to apply what they had learnt in the classroom (p.31; Wikramanayake, 2011, p.19).

According to the NIE, 150 in-service teachers have been trained in civics education since 2009, and 7,040 teachers have been trained in general education, which incorporates the topics of civics, peace and value education, and social cohesion, through the new nongraduate course for teachers in the system.

Yet it is not possible to obtain an exact figure of the number of teachers who received training in these subjects. These issues raise many questions for policy makers as the teachers are of paramount importance in delivering the curriculum in any education system. Policy leaders if they are serious about the promotion of social cohesion and social justice ought to investigate the training system for teachers and ensure that trainers are capable of imparting this knowledge to teachers. Again this raises the issue that this is mere rhetoric and leaders have failed to follow through with implementation.

Integrated Schools

The increase in the number of integrated schools, that is, schools that offer teaching in more than one medium (2 or 3 languages), has been an initiative proposed by policy makers for the promotion of social cohesion. Children learn to accept diversity and difference more easily than adults and if encouraged to mix with children of other cultures from an early age would naturally learn to respect and tolerate people of different ethnic backgrounds. Children in integrated schools have a better chance of developing friendships with peers of other ethnicities and religions, whereas children in segregated schools often get used to seeing only one point of view and tend to develop stereotype notions of other cultures.

In Sri Lanka, most schools are segregated by medium of instruction. There are at present only 484 schools in the island that offer mixed-medium education. This is barely 5 % of a total of approximately 10,000 schools. There are some schools that have two or three language mediums side by side, and this helps to create social harmony. Often these schools cater to three or four religions with shrines or places of worship for each. Some schools cater to two different ethnic groups but offer instruction only in one language.

Physical size and the location of schools do not make the task of increasing integrated schools easy. The site of a particular school may not also offer much chance for expansion or addition of classrooms, but there might be a possibility of bringing together two nearby schools that offer teaching to different ethnic groups. However, each ethnic group tends to be located in geographically different areas, and finding a location that has students from all ethnicities is difficult. This provides a big challenge to policy leaders to try to get children of different ethnic and religious groups to study together in the same classroom. Yet the urban areas of each district might provide a start for the building of an integrated school.

Next Steps

The biggest challenge for policy leaders in the immediate future is achieving a sense of national identity without destroying the ethnic and cultural identities of different groups in society. A start might be found in a celebration of the best in each cultural group focusing on values that can contribute to a national identity and culture. Strengthening and supporting the activities of the Social Cohesion Unit in the Ministry of Education is vital for the promotion of social cohesion in the country. The most success has been seen in the programs organized by this unit, and this is probably because the programs have touched the wider community and had their support. These programs if allowed to continue can reach every educational zone in the country and have a positive impact on the promotion of social cohesion in Sri Lanka.

Important next steps would include the urgent need to re-scrutinize all textbooks to ensure the removal of bias and stereotype statements of any ethnic or religious group especially in the subject of History. Education policy leaders might also ensure the inclusion of the histories of all ethnic and religious groups in the country and their contribution towards the national character and culture. Policy makers will also have to focus on teachers and their training in the context of the promotion of social cohesion. Measures will have to be taken to deal directly with the shortage of teachers in the second national languages and in English, both as a second language and for the purpose of bilingual education. Immersion courses and the recruitment of retired teachers might help solve the problem of English teachers in the short term. Training all teachers at National Colleges of Education (NCOEs) in the methodology of teaching a second national language might produce more teachers who could teach the subject part-time. A re-scrutiny of the bilingual education program is needed to ensure the program is maintaining the purpose of its initiation.

This is an interesting period in Sri Lanka's history. The country has made a good start in the initiatives for the promotion of social cohesion, but this alone is not enough. Policy leaders must ensure the momentum is maintained and particularly in the aftermath of the civil war, make certain that the country builds on these initiatives and moves towards achieving national solidarity and a culture of peace.

Leadership and Social Cohesion and Social Justice

From the above discussion, it is clear that at least in the Sri Lankan context although policy leaders had the vision to use education to build social cohesion in the country, not all initiatives were entirely successful. This has been due to several reasons. Firstly, it is apparent that all stakeholders and implementers down the line have to be convinced of the importance of the initiative or else the policy is not carried through. An understanding of the education system and its shortcomings is also an issue that policy leaders need to deal with. While policy leaders have the vision for future initiatives, the realities of achieving this vision in the circumstances must be understood. An understanding of the education system will give policy leaders a clearer view of what could be achieved in a given time frame. Shortcomings in the system can then be dealt with in order to achieve these aims.

The importance of achieving social cohesion in a multicultural, multireligious country like Sri Lanka that has been through years of civil war is brought home in this study. To rebuild a society to have respect, care, recognition, and empathy for all members of the society regardless of ethnicity, religion, or social status after years of mistrust and suspicion is not an easy task. It takes more than the vision of leaders to try to right wrongs that have taken place over the years. Commitment to the implementation of goals and conviction in the truth of these goals is important to ensure the carrying out of social justice. In the matter of social cohesion and social justice, the Sri Lankan study indicates that leaders must first make the effort to convince all stakeholders of their beliefs and of what is right in the context before making policy, as even the best policies can fail if those down the line are not convinced of its importance.

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Chapter 48
A Glimpse into Homelessness in the United States

Amy L. Warke

> *A brain tumor. When I was diagnosed, I had no idea my family and I would become homeless.*
> *– Mrs. Browning*
>
> *I'll admit it. I mismanaged our money. I never dreamed we would live in a hotel for two years.*
> *– Mr. Compact*
>
> *Divorce. I never thought a divorce would cause me and my children to become homeless.*
> *– Mrs. Trekker*

Homelessness. Have you ever thought about the people who are experiencing homelessness? Where they live? The circumstances that rendered them homeless? United Commissions on Human Rights (2005) reported an estimated 100 million people live without shelter or in unhealthy and unacceptable conditions. United Nations Centre for Human Settlements indicates that the majority of the 100 million people experiencing homelessness are women and children. Hulchanski (2009) confirmed those statistics indicating that women and children are the fastest growing subgroup of the homeless population.

The Brownings, the Compacts, and the Trekkers are three families experiencing homelessness that you will meet in this chapter. They represent more than the one million children and families experiencing homelessness in the United States who share "precarious living arrangements and the daily struggles to find food and shelter" (Love, 2009, p. 1). The National Center on Family Homelessness [NCFH] (2009) estimates that over the course of a year, "between 2.3 and 3.5 million people will experience homelessness, of which between 900,000 and 1.4 million will be children and 42 % of these children are under the age of six" (p. 1). Additionally, the statistics state "that children without homes are twice as likely to experience hunger as other children, twice as likely

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to experience health problems, as well as repeat grades in school, or drop out of school" (National Center on Family Homelessness, 2009 p. 1).

These staggering statistics require school leaders to consider a new form of leadership, transformative leadership (Kose and Shields, 2010; Shields, 2011) to help the growing numbers of families in need. Using the lens of transformative leadership, this narrative study (Clandinin & Connely, 2000) explores the realities of families experiencing homelessness and the challenges they faced in schools and with day-to-day living. This chapter will show the need for school leaders to employ transformative leadership to ensure that students are receiving an equitable quality education. Specifically this chapter recommends that leaders know and understand homelessness and the laws and rights that families experiencing homelessness have, and that leaders have the moral courage to change inequitable school practices to address the unique needs of the students experiencing homelessness.

Homelessness Defined in the United States

Currently, there is a transition in the definition that is used to define families as homeless in the public school system. The Homeless Emergency Assistance and Rapid Transition to Housing Act (HEARTH Act) was signed into law by President Obama in 2009. This Act is the most recent update in law to help those experiencing homelessness. However, as of May of 2012, public schools are still functioning under the Title VII of the McKinney-Vento Homeless Assistance Act. In the rest of this section, you will learn about the two laws that are available to help those who are homeless in the United States.

History of the HEARTH Act

A global crisis began in 2007 triggered by a financial crisis in the United States (Congressional Research Service, 2010). The repercussions of that financial crisis began to hit the housing market in the United States in 2008. It was because of this recession that many families began to lose their homes. In the United States, the Department of Housing and Urban Development specifically has programs to help families who have lost their homes. There has been an effort to merge the definitions of homelessness from the McKinney-Vento Homeless Assistance Act and the Department of Housing and Urban Development.

The HEARTH Act, also known as Public Law 111–22, details two findings: (a) the lack of affordable housing and the limited housing assistance programs and (b) homelessness occurs in rural, urban, and suburban areas across the United States

(National Alliance to End Homelessness, 2009). Additionally, the HEARTH Act expands the definition of homelessness. This definition now includes:

- People who reside in a shelter or place not meant for human habitation and who are exiting an institution where he or she temporarily resided
- People who are losing their housing and in 14 days and lack support networks or resources to obtain housing
- People who have moved from place to place and are likely to continue to do so because of disability or other barriers
- People who are victims of domestic violence and sexual assault (National Law Center on Homelessness and Poverty [NLCHP], 2009)

Specifically the HEARTH Act:

- Consolidates the separate homeless assistance programs carried out under Title IV of the McKinney-Vento (consisting of the supporting housing program and related programs, the safe haven programs, the section 8 assistance program for single-room occupancy dwellings, and the shelter plus care program) into a single program with specific eligible activities
- Codifies the continuum of care planning process as required and integral local function necessary to generate the local strategies for ending homelessness
- Establishes a federal goal of ensuring that individuals and families who become homeless return to permanent housing within 30 days (NLCHP, 2009)

The HEARTH Act is funded by federal grants and intended to be used by a community to help sponsor projects within a community to end homelessness.

The McKinney-Vento Homeless Assistance Act

The public schools continue to use the definition from the Federal Legislation Title VII of the No Child Left Behind Act named the McKinney-Vento Act. Under the Act, someone who is homeless is an individual who lacks a fixed, regular, and adequate nighttime residence. Additionally, the guidelines include:

- Sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason (sometimes referred to as doubled up)
- Living in motels, hotels, trailer parks, or camping grounds due to lack of alternative adequate accommodations
- Living in emergency or transitional shelters
- Abandoned in hospitals
- Awaiting foster care placement
- Children and youth who have a primary nighttime residence that is a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings
- Children and youth who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings

- Migratory children who qualify as homeless because they are living in circumstances described above (p. 2–3)

The three families you will meet in this study all qualify as homeless under the definition from the McKinney-Vento Act. Additionally, the act decrees:

> Each State educational agency shall ensure that each child of a homeless individual and each homeless youth has equal access to the same free, appropriate public education, including a public preschool education, as provided to other children and youths. (McKinney-Vento Homeless Assistance Act, 2002)

The act also mandates eliminating residency requirements for student enrollment based on qualifying as homeless and guaranteeing educational services. Children who are experiencing homelessness cannot be sent to a separate school because of their circumstances. The NCFH (2009) states that despite the provisions in the law, school districts' compliance with the act is less than complete. This further justifies the need for transformative leadership.

Literature on Homelessness in the United States

Currently, the scholarly literature related to homelessness focuses on school-related challenges that children and families experiencing homelessness face and makes suggestions for teachers, school counselors, and, at times, school principals. Most of these studies begin with an examination of the McKinney-Vento Homeless Assistance Act and in particular the need to address the gap between income and housing costs. Stronge (1993a, b) reiterated the need for continued research in access to education and academic success as well as the need for additional revision of public policy to enhance the educational opportunities of children experiencing homelessness.

Another topic in the literature comes from authors such as Nabors and colleagues (2004) and Yamaguchi and Strawser (1997). These authors identify the importance of school social workers developing collaborative relationships with families. Additionally, they recommend that counseling for children by social workers, helping with applications for free breakfast and lunch programs, assisting with acquiring clothing and food, and providing school supplies are needed services for the families. Additionally, Nabors et al. promote the need for schools to have medical and dental services provided in the school setting.

In 2006, Mawhinney-Rhoads and Stahler used a case study approach to recommend school reforms include "homeless children need to be tailored to the specific context of the community" (p. 288). This study reiterates that each family's experience with homelessness is unique and must be looked at on a case-to-case basis.

A provision of the McKinney-Vento Act mandates that schools have a local liaison to assist families experiencing homelessness. Miller (2009) discusses his role in assisting the homeless as a "boundary spanner" because it is more comprehensive and expands the role of the "typical" liaison. The role of a "bounty spanner" involves facilitating work "with and between teachers, families, and district-level administration" (Miller, p. 619). This type of leader will forge relations with not only school personnel but also outside organizations to ensure children and families experiencing homelessness will have someone to help them advocate for the rights given to them under the law.

Additionally, several authors add to the generally descriptive literature on the homeless, offering several hopeful descriptions of programs developed to offer support to children experiencing homelessness. One program created was The Yellow School Bus Project (Vissing, 2003) which helped families experiencing homelessness acquire the necessary school supplies and clothing needed to begin the school year. Another program in Orlando, Florida, is described by Pawlas, West, Brookes, and Russell (1994). This program works with families in shelters providing tutoring and scholarships for after- and before-school programs. In Phoenix, AZ, Woods (1996) assigns a mentor to children who are homeless. Lastly, a program described by Finley (2003) called "Dignity Village" helps residents who are homeless learn about technology and reading as well as teach others about what it is like to be homeless.

More theoretical studies were found and offer useful perspectives for educators. The concept of resilience, which is a "framework that looks to understand individual's responses to stress in difficult circumstances" (Reed-Victor & Stronge, 2002, p. 159), is discussed by several authors.

Reed-Victor and Stronge's (2002) study of resilience identified both individual and environmental factors that contributed to resiliency which helps children experiencing homelessness successfully navigate the challenges they face each and every day. Some individual factors they indicated "include a range of positive behaviors including social interaction, reactions to an interest in the environment, self-regulation, task orientation and positive self-appraisals" (p. 161).

Environmental factors that Reed-Victor and Stronge (2002) indicate are support, structure, and opportunity. They clarify these factors explaining that:

> Support entails warm caring relationships with significant adults; positive peer interactions; encouragement and recognition. Structure is clear, consistent and high expectations (in line with developmental level); shared values; instruction/mentoring in goal setting, problem solving, decision making and task completion. Opportunity is multiple avenues for talent and interest development; advocacy for expanded learning experiences; access to services. (p. 162)

Reed-Victor and Stronge advocate that schools combine the individual and environmental factors of resilience when designing programs to assist children and families experiencing homelessness.

In another study, Obradovic et al. (2009) found that when schools pay attention "to *early* preventative interventions" (p. 514), these children will have a better chance of decreasing the educational disparities that arise because of being homeless. Furthermore, they found that that resilience could help to overcome subsequent "troubles in secondary school and beyond" (p. 494).

Yet another study explored ways in which educators can address, or fail to address, the needs of minoritized students. Shields, Bishop, and Mazawi (2005) found that educators can have beliefs related to race, ethnicity, or, in this case, homelessness that reveal deficit thinking or pathologizing differences about certain groups of children. The authors also found that even negative attitudes among other students can be detrimental to a student who is marginalized. This leads to my choice of using transformative leadership as a useful theoretical lens for this study.

Transformative Leadership: A Lens for Leaders to Employ

Transformative leadership is an approach to leadership based on Burns' (1978) notion of leadership as being transforming rather than transactional. Unlike the transformational leadership theory of Leithwood and Jantzi (1990), transformative leadership focuses on the relationships among the inequities and material differences in the lived experiences of students and how they play out in educational settings (Shields, 2003, 2008).

Transformative leadership is based on Foster's conviction that leadership "must be critically educative; it can not only look at the conditions in which we live, but it must also decide how to change them" (1986, p. 185). When a leader addresses the needs of homeless children using transformative leadership, educators begin to have an understanding of the lived realities of these children and their family's experiences.

This perspective must be followed by critical consideration of how leaders provide support as they work to improve the realities of these children experiencing homelessness. The academic achievement of homeless children cannot be considered only from an educational or institutional perspective, but must be seen through a broader theoretical lens. Quantz, Rogers, and Dantley (1991) emphasize that transformative leadership "requires a language of critique and possibility" (p. 105) and that a "transformative leader must introduce the mechanisms necessary for various groups to begin conversations around issues of emancipation and domination" (p. 112).

Transformative leadership focuses not only on organizational effectiveness or improvement, but also on equity reform (Oakes & Rogers, 2006). That reform begins with questions of justice, democracy, and the dialectic between individual accountability and social responsibility (Weiner, 2003, p. 89). When looking at homelessness or any situation when someone is marginalized, through the lens of transformative leadership, a leader has the ability to focus on equitable education for all students.

A detailed framework presented by Kose and Shields (2010) examined transformative leadership. The framework identified five distinct elements that informed the analysis for this study and that distinguished transformative leadership from other theories. First, "the need to deconstruct and reconstruct knowledge frameworks that perpetuate inequity and injustice including the inequitable distribution of power" (p. 6) requires educators to reexamine ways in which we think about homelessness. When using this element, leaders conduct conversations with staff that address belief systems that contribute to the perpetuation of inequities.

Second, "the mandate to effect deep and equitable change that focuses on emancipation, democracy, equity, and justice" (p. 6) signifies our current practices still perpetuate injustice with respect to the education of homeless children. This entails leaders doing more than just talking about change. Leaders need to introduce socially just educational programs that develop citizens who are action oriented and will ensure change happens.

Third, "an emphasis on both private and public (individual and collective) good and the need to acknowledge interdependence of all people as well as inter-connectedness with one another" (p. 6) emphasizes the need for the school-community to include those who are traditionally marginalized. Leaders must recognize the dominant culture and ensure that all voices not just the dominant culture are "seen" in the curriculum.

Fourth, "the necessity of balancing critique with promise" urges positive action with respect to policies and practices that continue to marginalize the homeless. Shields (2003) would encourage leaders to engage in conversations [dialogue] that examine current practices and pedagogy to ensure that the curriculum is structured from students' lived experiences.

Finally, "the need for educators to exhibit moral courage" (p. 6) emphasizes the unpopular and therefore risky nature of acting on behalf of those who may be marginalized. This means holding difficult conversations and confronting behaviors that marginalize students who are not part of the dominant culture.

Each focus detailed in Kose and Shields (2010) emphasizes leadership that goes beyond "typical" organizational improvement and managerial tasks leaders engage in on a daily basis. It is a school leader's charge to emphasize ways to ensure a more equal playing field both in terms of access and outcomes (Farrell, 1999) for the most disadvantaged and challenged members of our society.

An updated framework presented by Shields (2011) expanded the system of belief of transformative leadership to include:

- The mandate to effect deep and equitable change
- The need to deconstruct and reconstruct knowledge frameworks that perpetuate inequity and injustice
- A focus on emancipation, democracy, equity, and justice
- The need to address the inequitable distribution of power
- An emphasis on both private and public (individual and collective) good
- An emphasis on interdependence, inter-connectedness, and global awareness
- The necessity of balancing critique with promise
- The call to exhibit moral courage (p. 8)

In a recent book, Shields (2011) explained how the final two beliefs, the necessity of balancing critique and promise and the call to exhibit moral courage, are embedded throughout all the beliefs. A transformative leader is one who is connected to the greater global community and recognizes that there are inequities in society and is willing to address those inequities that are present.

Transformative leadership is leadership that goes beyond "typical" organizational improvement and managerial tasks. "Transformative leadership is an exercise of power and authority that begins with questions of justice, democracy, and the dialect between individual accountability and social responsibility" (Weiner, 2003, p. 89). When employing transformative leadership, leaders, on a daily basis, engage in ways to emphasize and to ensure a more equal playing field for families experiencing homelessness. Transformative leadership suggests that leaders attend to issues of equity in order to provide a climate that will enhance student learning. Using this lens, I examine the ways in which school leaders can better offer a holistic approach to support the growing population of homeless students.

Studies have shown that children in poverty do not have equal access to educational experiences (Giroux, 1995; Ladson-Billings, 2009; Rothstein, 2004; Shields 2003, 2007, 2009a, 2009b). Houston (2003) states, "Public education isn't important because it serves the public, it is important because it creates the public" (p. 10). Shields (2009a, 2009b) states:

> to create the conditions under which all children can learn, it is important that every educator and every child believe that he or she actually belongs in school-that as citizens of a democratic society, the American ideal is attainable, in large part, through equitable educational opportunities. (p. 32)

It is through this lens of transformative leadership that I examine the ways that school leaders could offer a more comprehensive approach to assisting families experiencing homelessness.

The Families' Stories

The three families from the United States you are about to meet are all considered homeless based on the definition in the McKinney-Vento Act. Each family has a unique story that rendered them homeless. The families in this chapter had the opportunity to choose the pseudonyms that are used to protect their true identities.

The Brownings

No one ever thinks they are going to get sick. No one would ever think they would be homeless because they are sick. I was diagnosed with a brain tumor. That fact alone changed my life. It was what happened after that made me and my family homeless.

The bills began to pile up which was causing stress on me and my husband. He made a poor choice: he chose to attempt to rob a bank to get money to pay our bills. He ended up in jail. My kids and I ended up living in his taxi. It was the summer, so the weather was warm. Me and my six kids were in the taxi. I was petrified. I was afraid we would get pulled over because I did not have a license to drive the taxi. I was afraid I would get arrested and lose my kids.

We tried a shelter. They would not let my oldest son stay with us because he was 12. He had to stay with the men. He was afraid, and I was afraid for him. They gave us mats to sleep on the floor but we hated sleeping all together in one big room. The kids really hated it; they preferred to stay in the taxi.

Finally, Catholic Charities helped us. They pay for our rent and utilities and we live in a town house. If you look at us and where we live, no one would know that we are homeless.

School has been hard for the kids. They do not want anyone to know we are homeless. They really have not told their friends what has happened to us. They are afraid of the judgments people will make if we tell them our story. We stick together; this has actually made us closer.

My one daughter is suffering from depression and has attempted suicide because of all we have been through. She never felt comfortable telling anyone at school what has been happening. The school my kids go to now is like no other school I have ever experienced. The principal called me one day and asked, "Is there anything I can do for you? Do you need anything?" I ask that because I notice your son has worn the same clothes for 3 days. His shirt had a mustard stain on it. I began crying. I couldn't help it. No one had ever called and asked what we needed. They always assumed I was a bad mom and couldn't provide for my children. I told her everything – about my illness, about our experience. She helps us out.

Sometimes the school gives us projects that cost money. I do my best to make sure that the kids have what they need to do the project. We had to make something out of paper mache. It cost $20. I had to decide if we would eat or if we would buy the stuff for the project. Sometimes I don't think they think about things like that. We value education. My kids know that school means everything. That is how they are going to be successful.

The Compacts

We had an apartment, the kids had bedrooms, they shared, but they had their own rooms. I do admit, I mismanaged our money. We were evicted. We could not pay our bills, and we got into trouble with a lot of debt. I have a job and my wife has a job, but we have to live in a hotel room. We've been here for the last 2 years. I NEVER thought we would be here for 2 years, all six of us in one room.

We have been here 2 years for two reasons. One, where we live, they have an ordinance that states with the number of people in my family, I must rent a three-bedroom apartment. We can't afford three bedrooms, we can afford two bedrooms, and because of that, we are still in this hotel. We are paying off our debt living here. I know when we do get out of here, I will try to manage our money better.

We have had a really hard time with schools. In this one school, they thought my youngest was not old enough for school. We could not get to the birth certificate because it was in storage. They accused us of sending him to school too early. They never asked us anything. Then they thought I abused my children. Two different times, my daughter had a reaction to hair pins and my son has a birthmark. I had to sit and talk to the department of children and family services and answer questions about whether I abuse my children because of an allergic reaction and a birthmark. The school never talked to me.

The school the kids go to now is really different. The principal, she actually stayed one night to meet me and my wife to talk about concerns. It was after 6:00 when we met. I knew then that I would work with her. To stay late based on our schedule to help my son, that was great. We told her about my son's premature birth and services that he received. She had a plan ready to go to help him get on track. That was great. She also helped us get the birth certificate the school needed for my son. The other school never did that.

My children do not tell anyone about where we live or our circumstances. We think my wife got fired from her last job because we are homeless and live in a hotel. We want our kids to have their own rooms again. All six of us living in one room is really hard, but we are closer together because of it. We don't have places to go to spread out. It all happens in this one room.

The Trekkers

I was married, we had a lovely home, the kids had their own rooms, and we had belongings, things to call our own. My husband had not been working, and I lost my job. As if that stress was not enough, my husband was diagnosed bipolar and did not take medicine. We separated and I filed for divorce. I did not think that we would be homeless. We lost the house and had nowhere to go. I moved to the state my father lived in and me and the kids moved in with him. Five of us were sleeping in one bedroom of his two-bedroom condo. We knew it was not going to be forever. He was also in the process of selling his place.

I enrolled the kids in school and found a job. I also began searching for organizations that could help me. Luckily, I applied and was accepted to a community program that provides transitional housing and support so that we can make it on our own. My kids and I are now in a two-bedroom apartment. We have a home again.

The school my kids go to is great. They have helped us a lot since we moved here. They understood when I was registering my children and made sure we had everything they needed to start school. My kids do not tell anyone about our circumstances. They are afraid they will be teased. When we were moving into our apartment, my daughter told a friend she was getting a bed and the friend replied, "What's the big deal?" My daughter replied, "I've been sleeping on the floor for the past five months, I'm just a little excited."

The school has parent meetings to help homeless families like me. They let us know about all these resources that can really help us. They give us food at the meeting and provide child care so that the kids can come too. That helps the kids because they know other kids are going through the same thing they are.

Using the Lens of Transformative Leadership to Learn from Their Stories

Because these families were willing to share their stories, school leaders can learn from those stories through the lens of transformative leadership. Transformative leadership requires reflection and acknowledgement of the realities and inequities that exist. As you read, each family shares a unique story of their experiences with homelessness, but as you reflect on the stories, a common theme emerges from their stories. This final section will briefly examine how by utilizing the eight elements of transformative leadership (Shields, 2011) will assist leaders with new ways of understanding how to work with families experiencing homelessness, community organizations that can assist these families, and policy makers to ensure a more equitable quality education.

The Mandate to Effect Deep and Equitable Change

Deficit thinking (Shields et al., 2005) has a huge impact on the way children and families experiencing homelessness are treated. The families indicated that people make assumptions when they hear the word homelessness. Many of the families spoke of the "stigma" that exists when you mention the word homeless. Additionally, the families spoke of the stereotypes that exist when school personnel find out about their circumstances. In order to begin to have deep and equitable change, leaders need to be aware of these assumptions and stereotypes that exist in society.

The mandate to effect deep and equitable change begins with leaders having the courage to hold difficult conversations challenging assumptions, biases, and stereotypes that are held by those in the dominant culture. Once leaders begin to acknowledge that many school personnel unknowingly hold biases and assumptions and begin to address that these biases and assumptions are present, equitable education can begin to occur.

The Need to Deconstruct and Reconstruct Knowledge

To tackle assumptions and stereotypes that exist around homelessness, leaders need to deconstruct existing negative knowledge frameworks and reconstruct new ones. To do so, they will need to have conversations to address the deficit thinking which impacts the ability of children experiencing homelessness to receive an equitable education. These conversations and dialogue need to occur not only with staff but also with families, thus establishing and building a relationship of trust and partnership between the school and the family. Starratt's (1991) ethics of caring focused on developing relationships that are authentic and genuine. School leaders must challenge assumptions of staff by engaging in conversation dialogue that allows staff to confront deficit thinking so that all children have the opportunity to receive an equitable education. All of the families indicated that they value education. Ms. Browning would even ground her children if they did not bring home the grades they were capable of earning; the Compacts stated education is an equalizer. Many staff have the belief that these families do not value education; these two examples prove leaders need to challenge assumptions in order to move towards equitable education for children experiencing homelessness.

When deconstructing and reconstructing this knowledge, it is important for a leader to focus on equal equitable access to all children. Leaders should build strong relationships with staff so that the difficult conversations and dialogue can begin to help all deconstruct the knowledge held that contributes to deficit thinking.

A Focus on Emancipation, Democracy, Equity, and Justice

This form of transformative leadership employs the belief that to improve achievement for all students, "deep democracy" (Green, 1999) must be present. Specifically, Green urged, "*a deeper conception of democracy* that expresses the experience-based possibility of more equal, respectful, and mutually beneficial ways of community life" (italics original, p. vi). Transformative leadership "would seek to identify those who are included or excluded, privileged or marginalized, listened to or silenced; we would ask who benefits and who is disadvantaged by any given decision, practice, resource allocation, or curricular representation" (Furman & Shields, 2005, p. 134).

The basis for the beliefs of transformative leadership stemmed from Paulo Freire (1998). His belief was, "that education is not the ultimate lever for social transformation, but without it transformation cannot occur" (p. 37). This statement encourages leaders to be transformative and to infuse democratic education and social justice into the school system. Freire (1993) said, "the solution is not to 'integrate' them into the structure of oppression, but to transform that structure so that they can become 'beings for themselves'" (p. 74). Leaders need to include families in the decision-making process. When leaders included the families into the planning process and provided the training based on their needs, the families have a chance to change their circumstances. More importantly, the families had a say in what would be most helpful to them. By asking the families what they need to help change their situations and then bringing in speakers to support the families in those areas, attempts are made to break the barriers that exist by educating the families on what resources are available to help change their circumstances. It is because of those meetings that Mrs. Compact gained the confidence to reenter the workforce.

Additionally, leaders need to be aware of the curriculum that is being delivered to all students if they are to help teachers offer equitable and liberating learning experiences to all students. It is important to ensure that the curriculum encompasses all children's lived experiences. When school leaders are willing to have the conversation about curriculum, one can refer to Grumet (1995) who defines curriculum as the conversation "that makes sense of things" (p. 19). It is important for leaders to hold conversations with teachers to gain an understanding of curriculum, ensuring that all teachers know and understand cultural practices, backgrounds, and circumstances of all children and families in their schools. The hidden curriculum that is being delivered needs to be exposed to ensure that all students have an opportunity to learn and understand the "expectations" of the hidden curriculum. When the hidden curriculum is exposed, and all students are taught, an equitable education can begin.

The Need to Address Inequitable Distribution of Power

Transformative leadership must be what a leader lives on a daily basis. When the leader's belief system is one that challenges the status quo in order to ensure that other voices besides the dominant culture are heard and that democracy is teaching children to be citizens who take an active role in society, reform can begin to occur that will change society. Weiner (2003) recognized that transformative educational leaders work within a hierarchical system and must learn to "exercise effective oppositional power, to resist courageously, to be activists and voices for change and transformation" (p. 102). He continued to say transformative leaders must "take risks, form strategic alliances, to learn and unlearn their power, and reach beyond a 'fear of authority' toward a concrete vision of the work in which oppression, violence, and brutality are transformed by a commitment to equality, liberty, and democratic struggle" (p. 102).

The families in this chapter indicated barriers that were perpetuating their circumstances of homelessness. One family, the Compacts, has money, however, must continue to live in a hotel because of the local ordinances that exist forcing the family to rent a three-bedroom apartment because of the number of people in their family instead of a two-bedroom apartment that they could afford on their salaries. The Brownings indicated practices that shelters enforce, having all family members present for entry and that boys at the age of 12 must sleep with the men instead of with their families. Transformative leaders need to begin to challenge policies and practices that continue to marginalize these families.

Emphasis on Both Private and Public (Individual and Collective) Good

The purpose of education is to build an educated citizenry. Barber (2001) wrote, "For true democracy to flourish there must be citizens. Citizens are women and men educated for excellence by which term I mean the knowledge and competence to govern in common their own lives" (p. 12). Having an educated citizenry will be a first step in attempting to alleviate the inequalities that currently exist in society. Leaders need to encourage and support an equitable environment that supports a child's academic, social, and emotional growth as well as one that creates "learning communities in which each person feels a strong sense of belonging and safety and in which each knows that he or she has something important and meaningful to contribute to the learning situation" (Shields, 2008, p. xiv).

Additionally, to create a climate for the collective good, the ethic of justice (Starratt, 1991) promoted participating in society by teaching the individuals to think and act in terms of the common good for the community as a whole. Starratt also promoted ethics of caring which "requires fidelity to persons, a willingness to acknowledge their right to be who they are, an openness to encountering them in their authentic individuality, a loyalty to the relationship" (p. 195). The families indicated the need to develop a relationship with those experiencing need in order to ensure that the specific needs of the family were being met. I even found that when a strong relationship existed between the family and the school leader, (or the interviewer in my case) the findings were more detailed and specific. Leaders need to ensure that strong relationships are built with all families to ensure the schools are producing citizens that are caring and contributing to all of society.

Emphasis on Interdependence, Inter-connectedness, and Global Awareness

It is important for school leaders to understand that by providing the necessary support for those families experiencing homelessness is not simply an expression of generosity, but a way of promoting a mutually benefitting, interdependent society (Starratt, 1991). It is not simply ensuring that the basic needs of food, clothing, and shelter are provided, but ensuring an educational environment that is equitable and just.

All of the families commented on the supports that are provided to help the families meet the basic needs of survival, but more importantly, it was the families' sense of belonging that helped them feel welcomed and part of the educational environment. From my personal experience, even though children's homeless status was recorded on their permanent records, as they progress from elementary to middle school, their status was sometimes ignored or overlooked, which singled out the student, perpetuating the feelings of embarrassment and fear.

The Necessity of Balancing Critique with Promise

It is important for leaders to engage in conversations about policies and practices that continue to create barriers for those families experiencing homelessness. The families indicated several policies that created barriers to the families.

The Brownings indicated how the shelters would not allow the son, 12, to stay with the family. Because of his age, he (at 12) had to go stay with the men at the shelter. This policy forced the family to stay in the car instead of in a shelter. The Compacts were not allowed to rent a two-bedroom apartment that they could afford because of policies that dictated the number of people who were allowed to live in a two-bedroom apartment.

Policy makers should examine the practice of paying for transportation, using taxpayers' money, transporting children long distances to attend the school of origin. Would it be better for policy makers to consider using the money to assist the families by using the money to gain greater stability for the family? Additionally, local policy makers should examine the current practice of not allowing larger families to rent a home or apartment that is within their means, forcing some families to remain homeless.

The Call to Exhibit Moral Courage

In order to fulfill the beliefs of transformative leadership, it is evident that moral courage is needed. This belief is embedded throughout each tenant of transformative leadership. Shields (2011) summarizes this belief below:

> It must be apparent that if one is driven by a sense of moral purpose and clarity about the multiple goals and purposes of education, one cannot identify the need for deep and equitable change without subsequently beginning to deconstruct the knowledge frameworks that perpetuate the structures and cultures that need to be changed, and trying to replace them with alternative ways of thinking and knowing. … Further, to do any of this successfully, and particularly to go beyond simple critique to introduce educational experiences that hold promise of a better future, requires a healthy dose of moral courage. (p. 2)

The final summary of transformative leadership that I want to leave with everyone is found in an article from Shields (2010). Shields wrote:

> Transformative leadership, therefore, recognizes the need to begin with critical reflection and analysis and to move through enlightened understanding to action – action to redress wrongs and to ensure that all members of the organization are provided with a level playing field as possible – not only with respect to access, but also with regard to academic, social, and civic outcomes. In other words, it is not simply the task of the educational leader to ensure that all students succeed in tasks associated with learning the formal curriculum and demonstrating that learning on norm-referenced standardized tests; it is the essential work of the educational leader to create learning contexts or communities in which social, political, and cultural capital is enhanced in such a way as to provide equity of opportunity for students as they take their place as contributing members of society. (p. 17)

Society is in need of transformative leaders who are willing to confront deficit thinking perpetuated by the dominant culture. These leaders need to ensure that all children, regardless of their circumstances have the ability to receive an education that teaches everyone to become a productive citizen to further advance our society.

Conclusion

Every country across the globe has families who are experiencing homelessness. Each country has different policies and practices that are intended to help these families change their circumstances. This chapter has shown that it takes more than policies and practices to change these families' circumstances. It takes a leader, specifically, a transformative leader, who is willing to hold difficult conversations, challenge the status quo, and has the moral courage to bring attention to the inequities that exist for families in need.

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Chapter 49
Reducing Socioeconomic Inequity by Improving the Equity of Education

Ned Van Steenwyk

Introduction

Socioeconomic inequities can be difficult to deal with when the adult labor force has low levels of productivity and education and a lack of employment opportunities. These challenges become further complicated when a country is not focused on correcting deficiencies in regulations, judicial systems, security, and other factors that make a developing country less attractive for investors. While equity in education is a worthy goal in itself, the real payoff for many developing countries can be subsequent improvements in socioeconomic equity and reductions in poverty. To achieve improvements in socioeconomic equity, inequities in education must be addressed, with ambitious goals to improve the coverage and quality of education and a clear focus on the equity of education.

The purpose of this chapter is to examine the challenges and opportunities for reducing socioeconomic inequity through education planning and improving equity in education. Prioritizing investments in education, however, can become very confusing for decision makers, and opportunities may be lost when inappropriate information is used for allocating limited resources. Honduras is used as an example.

The chapter begins with background information on Honduras and the region, the challenges and opportunities facing the country; a brief discussion of education and development; followed by sections on socioeconomic inequity, equity in education, challenges and opportunities for reducing inequities; difficulties with the use of enrollment data from local and international sources for tracking improvements

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in coverage rates; and a summary of efficiency issues. The conclusions summarize the probabilities for reducing socioeconomic inequity by improving the equity of education, with policy recommendations for establishing ambitious but realistic goals for achieving improvements in the equity, quality, and efficiency of education in Honduras.

Background

While each country in Central America has its own particularities and challenges, the entire region was affected by the cold war and the civil wars of the previous decades. Today, Central American countries are grappling with the increased influence of organized crime, drug trafficking, gangs, unemployment, poverty, socioeconomic inequities, and the ideologies of the cold war – which are still shaping political positions in the region.

Honduras is the second largest country in Central America with a population of 8.2 million, an average of 6.9 years of education for the working-age population and a monthly per capita income of $146.[1] The country's largest trading partner is the United States and with the economic downturn in 2008, the demand for exports from Honduras was significantly reduced, resulting in increased unemployment and underemployment. Problems were exacerbated by political turmoil during 2009 with the controversial removal of the president, the polarization of civil society, social unrest, and the suspension of economic and security assistance by international donors. This resulted in further increases in unemployment and underemployment, increased violence and drug trafficking. From May 2008 to May 2011, unemployment increased by 61 % and underemployment by 59 %, with increases in extreme poverty and limited employment opportunities for young people.[2] The education system also suffered with continuing teachers' strikes and limited days of class from 2009 through 2011.

Although the population was warned by the supporters of the deposed president to stay away from the polls because of violence, elections were held in November 2009 as voters turned out in record numbers and a newly elected president took office in January of 2010.[3] International donors ended the suspension of economic and security assistance in July 2010, but many of the suspended activities did not begin significant disbursements until 2011 and 2012 as donors reviewed and reprogrammed their assistance programs.

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[1] Instituto Nacional de Estadística (INE), *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2011, Household Survey).

[2] INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2008 and May 2011); and Ned Van Steenwyk y Rolando Sierra Fonseca, *La Oferta y Demanda de la Educación Técnica y Formación Profesional en Honduras* (Tegucigalpa: Programa de Apoyo a la Calidad de la Educación Básica del Plan EFA-FTI (GIZ) y el Ministerio Federal de Alemania de Cooperación Económica y Desarrollo, 2011).

With three administrations in less than a year, the poorest sectors of the economy were the most affected, and per capita income declined by 4.4 % from May 2008 through September 2010. Although some of the jobs that had been lost in industry and other sectors during 2008–2010 began returning during 2011, many of the positions had salaries below the poverty level for heads of families and contributed to an increasing underemployment rate of more than 45 %, and the percentage of the population living in poverty increased from 64 to 67.6 %. The problem is a lack of employment opportunities for nearly 200,000 people entering the labor force annually, while the combined unemployment and underemployment rates are at 51 %.[4]

In addition to the challenges summarized above, there are demographic changes. Birth rates have been declining, following decades of high birth rates, while the working-age population is growing and the ratio of dependents (0–14 and 65+ years of age) in relation to the working-age population is declining. The changes in the distribution of the population by age groups could reduce economic burdens on parents and provide more resources for improvements in the quality of life of families. The following graph summarizes the window of opportunity for Honduras from the year 2015 until 2040 when the ratio of the dependent population, as compared to the workforce, will be below the working-age population. The top line on the left side of the graph is the ratio of dependents in relation to the working-age population. The next line at the left of the graph, which rises above the ratio of dependents in the year 2015, represents the working-age population. The third line is the dependent population of children 0–14 years of age, and the bottom line depicts dependents of 65 years of age and older.

The graph, fig. 49.1, summarizes the window of opportunity that Honduras is about to enter, which could reduce poverty – if productivity increases with better paying jobs. Based on the experiences of other countries that have gone through similar changes in the distribution of their populations by age groups, the keys to success for Honduras will depend on the levels of education and productivity of the

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[3] Voters were initially hesitant and nervous, but as the day went on, more and more people turned out to vote, ending the day with a record turnout. The author was an international observer for the elections in the province of La Paz.

[4] Unemployment in Honduras is 4.3 % and underemployment 46.7 % for a total of 51.0 %. Extreme poverty is having a monthly income of less than $64 per family member for food. Relative poverty is an income of less than $110 per family member for food, public transportation, minimum housing, health, and public education costs for children. Data on employment, poverty, and incomes from INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2011).

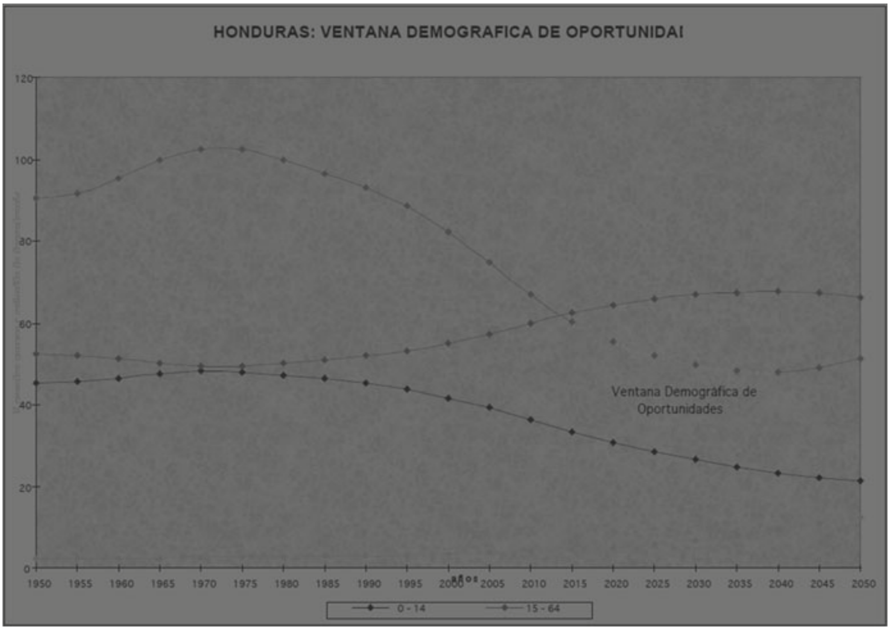

Fig. 49.1 Population changes from 1950 to 2050 (Source: United Nations Population Fund (UNPF) y el Comisionado Presidencial para la Reducción de la Pobreza, *El Cambio Demográfico: Motor de Desarrollo* (Tegucigalpa 2009))

young workforce from 2015 to 2040 and attracting investments for providing employment opportunities and higher incomes.

Countries that did not have a better educated and more productive young workforce as this segment of the population was growing and could not provide appropriate employment opportunities for a growing young workforce experienced increased poverty, unemployment, civil unrest, and violence (Afghanistan, Angola, Botswana, Ethiopia, Ghana, Haiti, Iran, Iraq, Pakistan, and Uganda).[5] One of the biggest challenges during the twenty-first century for Honduras and other developing countries with a growing young workforce will be attracting investments to improve employment opportunities.[6]

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[5] United Nations Population Fund, *Op. Cit.* and Richard Cincotta, Robert Engelman and Daniele Anastasion, *The Security Demographic: Population and Civil Conflict after the Cold War* (2003).

[6] Jim Clifton, *The Coming Job War* (Gallup Press, 2011) and "The Ultimate 21st Century Challenge: Good Jobs," *Trends-Magazine* (April 2012), at Trends-Magazine.com. See also USAID, *Central America and Mexico Gang Assessment* (2006) and Clare Ribando Seelke, *Congressional Research Report for Congress: Gangs in Central America* (2008) for the consequences of low levels of education and a lack of opportunities for a growing young work force.

Education and Development

The importance of education for developing countries is widely accepted, and this has contributed to wider public access to data and research on education in developing countries.[7] Assuring that all children complete primary school is the first challenge, but the value of post-primary education is also well documented, with increases in secondary education enrollments and graduates associated with export-led growth, the attraction of international capital, technology transfers, a more competitive young workforce, and the reduction of poverty. Improvements in the quality of secondary education are also associated with better jobs, higher incomes, and increased economic growth.[8] These are the changes Honduras needs to employ its young workforce and provide higher-paying jobs.

Historical data from 1970 to 2000 provides further insights on achieving accelerated rates of economic growth for a country like Honduras, with the most promising combinations of education attainment for a young workforce. Based on evidence from 120 countries, universal primary education and 50 % of the population with secondary education would provide the highest probable rate of economic growth for Honduras.[9] The World Bank also shows attractive private rates of return on education, with a high school education having the highest rate of return for young people in Honduras, and household survey data shows an average income increase of 13 % for young people 14–17 years of age with each additional grade of secondary education completed.[10]

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[7] For comparative data on the education systems of countries, see UNESCO's Institute for Statistics and the Work Bank's Education Statistics at www.worldbank.org. For Latin America and the Caribbean, see USAID, *Latin America and the Caribbean Selected Economic and Social Data*. Research summaries are also available from USAID, the World Bank and the German Development Agency (GIZ); see, for example, Abby Riddell, *Factors Influencing Educational Quality and Effectiveness in Developing Countries*: *A Review of Research* (GIZ, 2008) and for Latin America, Javier Murillo, "School Effectiveness Research in Latin America," in the Springer *International Handbook of Education* at springerlink.com. For educational outcomes in developing countries, in terms of international testing results, see data from the *Programme for International Student Assessment* (PISA), the *Third International Mathematics and Science Study* (TIMSS), and for Latin America, see the *Segundo Estudio Regional Comparativo y Explicativo* (SERCE).

[8] See, for example, DFID Practice Paper, "The Importance of Secondary, Vocational and Higher Education to Development" (July 2005); World Bank, "Expanding Opportunities and Building Competencies – A New Agenda for Secondary Education" (2005); and Eric Hanushek and Lugar Wobmann, *Education Quality and Economic Growth* (2007).

[9] International Institute for Applied Systems Analysis (IIASA) and the Vienna Institute of Demography (VID) at the Austrian Academy of Sciences, *IIASA Policy Brief*: "Economic Growth in Developing Countries: Education Proves Key" (August 2008); a growth rate of about 13% annually is projected for Honduras, Guatemala, Kenya, Rwanda, and Uganda with more emphasis placed on secondary education.

[10] Rates of return from the World Bank, *Central America Education Strategy – An Agenda for Action* (2005), p. 73: Private rates of return for people 18–30 years of age in Honduras are 6.4 % for completing primary education, 6.0 % for lower secondary education (middle school), 13.3 % for high school, and 10.9 % for tertiary education. Income increases from household survey data cited by Philip Marx, *La Inseguridad y su Efecto en el Sistema Educativo de Honduras* (Tulane University, June 2010); presentations on the effects of urban violence on enrollments for youth 14–17 years of age.

Today, with nearly 90 % of the children in Honduras completing primary school, the demand for post-primary education is increasing, parents are much more aware of the importance of education, and more than 90 % of the young people would like to continue their studies through secondary education, which are positive trends for a growing young workforce.[11]

Socioeconomic Inequity

Most Latin American countries have high levels of income inequity, and lower incomes are associated with lower levels of education.[12] The Gini coefficient for Honduras is 53.8–55.3, which is high but about average for the region.[13] Honduras, however, is one of the poorest countries in Latin America, resulting in economic inequities, inadequate incomes, and poverty being more evident, as compared to higher-income countries with similar Gini coefficients.[14] The following table summarizes the income and education characteristics of heads of households and shows an inverse relationship of incomes and family size, with higher incomes associated with higher levels of education.

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[11] Results of a survey with over 1,400 young people 16–22 years of age in urban and rural areas in 16 of the 18 provinces of Honduras: 94 % expressed a desire to continue their studies through secondary education, including 90–91 % of the dropouts and out-of-school population; see Ulana Umansky, Russbel Hernandez, Mario Alas, and German Moncada, *Alternative Upper Secondary Education in Honduras*: *Assessment and Recommendations* (USAID, Academy for Educational Development and CIDEH, 2010).

[12] For one of the early studies on the association of inequities in education with subsequent socio-economic inequities in Latin America, see Juan Luis Londoño, *Poverty*, *Inequality*, *Social Policy*, *and Democracy*, World Bank Conference on Development in Latin America and the Caribbean (1995). For more recent data on the association of higher levels of education with higher incomes and reduced poverty, see the household surveys and census data from countries.

[13] Gini coefficients are used for estimating income equity and range from 0, with everyone in a country receiving the same income, up to 100, with 1 person in a country receiving all of the income. No countries are at the extremes of 0 or 100, and most countries range from about 30 to 60. Gini coefficients vary from the two sources cited below: South Korea 31.3–31.6; USA 40.8–45.0; Mexico 46.1–48.1; Peoples Republic of China 41.5–46.9; Nicaragua 43.1–52.3; Costa Rica 47.2–49.8; Peru 49.6–52.0; El Salvador 49.7–52.4; Chile 52.0–54.9; Paraguay 53.2–58.4; Guatemala 53.7–55.1; Honduras 53.8–55.3; Colombia 53.8–58.5; Panama 54.9–56.1; Brazil 55.0–56.7; Bolivia 58.2–59.2; Haiti 59.2; etc. See http://hdrstats.undp.org/en/indicators/161.html (UNDP, 2009 Human Development Report) and other sources citing Gini coefficients from the US Central Intelligence Agency.

[14] Comparing Honduras with other countries with similar Gini coefficients can be misleading. While Honduras, Guatemala, Panama, Paraguay, Colombia, and Chile have similar coefficients, the per capita income for Honduras is 15–20 % less than the per capita incomes of Paraguay and Guatemala, half of the per capita income of Colombia, 1/3 of the per capita income of Panama, and 1/4 of Chile's per capita income. With less money to distribute among the population of a country, inequities and inadequate incomes are more evident than in higher-income countries with similar Gini coefficients.

Table 49.1 Income and education characteristics of heads of households

Income quintiles	Monthly income per capita[a]	Years of education of heads of families	Family size	Monthly family income[a]
1st quintile (poorest 20 %)	$18	4.6 years	5.4 people	$98
2nd quintile	45	5.0	5.2	236
3rd quintile (average income)	80	5.7	4.9	392
4th quintile	138	6.9	4.4	609
5th quintile (wealthiest 20 %)	448	9.9	3.6	1,612

Source: Instituto Nacional de Estadística (INE), *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2011), Ingresos de Hogares

[a] Monthly incomes in US dollars (L19 = $1)

Table 49.1 shows the association of higher incomes and higher levels of education, with smaller families for upper-income groups. Socioeconomic inequities are evident and achieving improvements in equity will require improvements in the education levels of the workforce, with better paying jobs for reducing the high poverty rate that affects 68 % of the population and the 51 % unemployment and underemployment rate. With demographic changes, however, Honduras will have a larger and better educated young workforce, and fewer dependents. This could reduce poverty and inequities – if investments can be attracted for increasing employment, providing higher-paying jobs for the young workforce, and students receive the best education possible for increasing their productivity before entering the labor force.

Equity in Primary Education

Primary school enrollments show high levels of equity based on the net and gross enrollment rates for children from the richest and poorest families. The net enrollment is 82.6 % of the children from the poorest families and 83.4 % for the children from families with the highest incomes, with gross enrollments of more than 100 % for children from all income levels.

Table 49.2 shows high levels of equity for net and gross enrollment rates in primary education, but the net rates do not include the enrollment of many children who are under- or overage. The high gross enrollment rate for children from lower-income families of 107 % as compared to 102 % for the richest families appears to be positive – but the higher gross enrollment rate for lower-income students also reflects inequities, with lower levels of achievement, higher failure and repetition rates for children from lower-income families.[15]

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[15] For data on the economic status of children, failure and repetition rates, and standardized test scores, see Germán Moncada y Mario Alas, *El Currículo Nacional Básico en el Aula* (SE, USAID, American Institutes for Research and CIDEH, 2009).

Table 49.2 Enrollment rates for children from the poorest and wealthiest families in primary education

Socioeconomic level of families	Net enrollment[a] (%)	Gross enrollment[a] (%)
1st quintile (poorest 20 %)	82.6	106.7
2nd quintile	86.8	113.3
3rd quintile (average incomes)	88.9	114.9
4th quintile	87.8	111.8
5th quintile (wealthiest 20 %)	83.4	101.6

Source: INE, *EncuestaNacional de Demografía y Salud*, (ENDESA) (2006); pp. 32–36

[a] The net enrollment in primary school is based on the enrollment of children 7–12 years of age/ population of children 7–12 years of age for the National Statistics Institute (INE). The gross enrollment rate is the total enrollment in primary education/population of children 7–12 years of age. The gross enrollment rate can exceed 100 % with under- and overage students

There have been significant improvements in the efficiency of primary education, however, with the implementation of strategies from a multi-donor program with the Secretariat of Education (SE) under the Education for All – Fast Track Initiative (EFA-FTI). The annual dropout rate in primary schools of 3.4 % was reduced to 0.9 %, repetition rates for grades 1–6 were reduced by an average of 24 % during the same period, and student achievement on standardized tests increased. Reductions in dropout and repetition rates should continue with curriculum reforms in primary education and access to 1 year of preschool education increasing to 82 % in the year 2009.[16] Further reductions in dropouts and repetition are needed, however, to achieve the EFA-FTI goal of all children completing primary school.

Equity in Secondary Education

During the past decade, primary school graduates increased from 69 % in the year 2000 to 88 % by 2009, resulting in increased enrollments in middle school, with a 79 % gross enrollment rate for the 7th grade in the year 2010 and a 70 % rate for the 7th–9th grade.[17]

With increases in enrollments in lower secondary education (7th–9th grades), enrollments in upper secondary education (10th–12th grades) also increased to

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[16] SE, *Avances y Logros Educativos en la Educación Básica* (2009) for improvements in primary education. Enrollments of children 5 and 6 years of age in preschool (preparatoria)/population 5 years of age = 82 % coverage of 1 year of preparatoria in 2009; the enrollment of children from 5 to 6 years of age is used in the calculation for enrollments in preparatoria because Honduras is in a transition to lower the age for enrolling in the 1st grade of primary school to 6 years of age and age 5 for preparatoria (preschool) before enrolling in primary education.

[17] Total enrollments of 402,524 students in the 7th–9th grade/a population of 573,241 people 12–14 years of age = a gross enrollment rate of 70.2 % for the 7th–9th grade. Enrollments from the SE for the year 2010 and population data from INE for 2010 (INE, *Proyecciones de Población 2001–2015*).

Table 49.3 Enrollment rates for youth from the poorest and wealthiest families in lower and upper secondary education

Socioeconomic level of families	Net enrollment (%)	Gross enrollment (%)	Enrollment probability
1st quintile (poorest 20 %)	9.0	11.4	1.0
2nd quintile	17.8	23.6	2.0
3rd quintile (average incomes)	35.6	47.1	4.1
4th quintile	54.6	74.1	6.5
5th quintile (wealthiest 20 %)	72.0	97.4	8.5

Source: Enrollment data from INE, *Encuesta Nacional de Demografía y Salud* (ENDESA), (2006). Calculations of enrollment probabilities by the author based on gross enrollment rates by quintiles of income

49.9 % in 2010.[18] With higher incomes associated with higher levels of education, probabilities for improving future socioeconomic equity are increasing with higher enrollment rates in secondary education, but secondary education is characterized by more inequities than the primary level. Table 49.3 summarizes inequities in access for young people by family incomes.

Table 49.3 shows that the economic status of students is associated with probabilities for enrolling in lower and upper secondary education with much higher probabilities for enrollment for the children from higher-income families. In addition to inequities based on the socioeconomic status of youth, nearly 3 out of 4 students enrolled in grades 10–12 and most of the high schools for upper secondary education are located in urban areas (76 %), with some rural provinces having very few high schools for young people to continue their education.

Gender inequities are also evident with 1.4 times more females enrolled in high schools in rural areas.[19] The following table summarizes problems with gender and geographic parity. Enrollments for females are higher, and youth from urban areas have 2.7 times more probability of being enrolled in high school, as compared to youth from rural areas.

Table 49.4 shows that urban youth are 2.7 times more likely to be enrolled in high school than rural youth, but the problem is not limited to a lack of access to the 10th grade. More students from low-income and rural sectors are not completing previous grades. Five rural provinces reported gross enrollment rates in high school of 30 % or less for the 2010 school year, while urban provinces reported the highest enrollment rates, with the total national gross enrollment rate at 50 % (Table 49.7)

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[18] Total enrollments of 266,910 in grades 10–12/a population of 534,852 people 15–17 years of age = a gross enrollment rate of 49.9 % for grades 10–12. (Note: total enrollments include an adjustment for young people enrolled in academic programs which are 2 years in length in grades 10–11, with these students graduating at the end of the 11th grade, while most students are in programs of study 3 years in length and graduate at the end of the 12th grade). Calculations by the author with data on 2010 enrollments from the SE and cited in Van Steenwyk and Sierra Fonseca, *Op. Cit.*

[19] Data on urban, rural, male, and female enrollments is for the 2010 school year from INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2010).

Table 49.4 Geographic and gender inequities in high school enrollment rates

	Data from INE (%)	Probability of being enrolled
Rural and urban		
Urban	42.4	2.7
Rural	15.6	1
Male and female		
Urban	42.4	
Male	41.5	1
Female	43.2	1.04
Rural	15.6	
Male	13.2	1
Female	18.6	1.4

Sources: INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (September 2010), Educación, Cuadro 2. Probabilities calculated by the author based on enrollment rates

and enrollment rates by provinces varying from 17 to 74 %.[20] More females complete middle school and are more likely to be enrolled in high school than males on the national level, but Table 49.4 shows that the most serious problem in gender parity is in rural areas (1:1.4) because of the need to work and higher opportunity costs for attending school for lower-income rural males. Low-income urban youth, however, have the added strain of violence and insecurity in some neighborhoods reducing probabilities for enrollment by 20 % or more.[21]

In summary, enrollments and graduates from primary, middle schools, and high schools are increasing, and equity in primary education is high – which could help reduce income inequities in the future. Continuing inequities in access to post-primary education for lower-income and rural students, however, will make it more difficult for these young people to escape the poverty of their parents.

Challenges and Opportunities for Reducing Inequities

In a country with 68 % of the population living in poverty, there are major challenges for receiving a demographic bonus with a growing young workforce and the competition of countries for investments to improve employment opportunities. There are also the dangers of a demographic time bomb for Honduras, if investments are not attracted to provide more employment opportunities, as a consequence of high levels of unemployment and related problems.[22] With the evidence pointing towards the importance of secondary education, Honduras established goals under

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[20] Van Steenwyk and Sierra Fonseca, *Op. Cit.*

[21] Philip Marx, *Op. Cit.*

[22] Cincotta, Engelman and Anastasion, *Op. Cit.*; USAID, *Op. Cit.*; Seelke, *Op. Cit.*; Van Steenwyk and Sierra Fonseca, *Op. Cit.*

Table 49.5 Net enrollment rates in secondary education

Country	Net enrollment rates for lower and upper secondary education
Chile	85 % (2008)
Cuba	83 % (2009)
Brazil	81 % (2008)
Argentina	79 % (2007)
Colombia	74 % (2009)
México	72 % (2008)
Perú	71 % (2008)
Uruguay	70 % (2008)
Bolivia	69 % (2008)
Venezuela	69 % (2008)
Panamá	66 % (2008)
Belize	65 % (2009)
Dominican Republic	61 % (2009)
Ecuador	59 % (2007)
Paraguay	59 % (2008)
El Salvador	55 % (2008)
Costa Rica	52 % (2006)
Nicaragua	45 % (2008)
Guatemala	40 % (2008)
Honduras	34 % (2011)

Sources: USAID; http://lac.eads.usaidallnet.gov; Development Statistics for Latin America and the Caribbean (2006–2009), with no data on secondary enrollments reported for Honduras; and INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2011), for school attendance data on the population 13–18 years of age in Honduras

its Poverty Reduction Strategy (*Estrategia para la Reducción de la Pobreza*: *ERP*) for a 70 % net enrollment rate in lower secondary education and 50 % of the youth completing high school by the year 2015. Goals for the country's new National Development Plan are a net enrollment rate of 100 % for grades 1–9, a net enrollment of 75 % for high school, and increasing student achievement based on standardized tests to 70 % on all levels of the education system by the year 2038.[23]

The strategy Honduras is using for reducing poverty by increasing the education levels of youth is backed by evidence from many countries with increases in economic growth, technology transfers, and higher incomes associated with higher levels of education. Improvements in primary, middle, and high school completion rates should help more young people break out of the poverty cycles that have been passed on to children from low-income families. Table 49.5, however, shows that Honduras is at a disadvantage for attracting investments to improve employment opportunities for a growing young workforce based on the goals established for *net* enrollment rates, with Honduras having the lowest net enrollment rate in Latin America for secondary education.

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[23] República de Honduras, *Visión de País 2010-2038* (2009) and Government of Honduras, *National Vision and Plan Summary* (2010).

The preceding table shows that Honduras has a very low net enrollment rate for lower and upper secondary education (grades 7–12). This is a serious concern for planning investments in education, with half of the potential and emerging workforce of Honduras being 15–29 years of age and two-thirds of the population under the age of 30. Both the SE and INE are reporting very low net enrollment rates for secondary education, which could affect the country's productivity and reduce chances for improving income equity for another generation, leading many people to conclude that the highest priority must be for increased investments to expand access to post-primary education.[24]

While many international organizations use net enrollment rates for comparing the coverage of education systems of countries and some international donors encourage developing countries to report net enrollment rates, there are problems with using net coverage rates in a country like Honduras. The use of net enrollment rates may help a country attract donor funding for expanding access, but using net enrollment rates for education planning can result in serious misunderstandings of the challenges facing education systems and mistaken priorities for the use of limited resources in many countries. Net and gross enrollments can be similar in more developed countries, when education systems have efficient pass rates and children begin school at an appropriate age, but in many developing countries, constraints analyses for improving equity in post-primary education will result in very different conclusions when using net or gross enrollment rates.

The net enrollment rate is an indicator for both coverage and efficiency, because the focus is on students of an appropriate age being enrolled in a grade level. In many developing countries, students may be in other grades as a consequence of not beginning school at an appropriate age, failing a grade or two, or dropping out of school and then returning. For example, in 2009, the SE reported 215,570 students 12–14 years of age enrolled in middle school (grades 7–9)/population of 562,743 ages 12–14 = 38.3 % net enrollment rate for lower secondary education. The National Statistics Institute (INE) reported a similar rate for net enrollment with the May 2009 household survey: 245,340 students 13–15 years of age attending school/population of 639,735 youth 13–15 years of age = a net enrollment rate of 38.4 %, and by May 2011, the net coverage rate reported by INE had increased by only 0.8 percentage points to 39.2 %.[25]

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[24] Net enrollment rates are the students of a specific age who should be enrolled in grade levels. Gross enrollment rates are the total enrollments in grade levels/the school-age population that should be enrolled in grade levels.

[25] INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (May 2009 and May 2011). INE and the SE have been using different ages for net enrollment rates in primary school, grades 7–9 and 10–12. INE was using the traditional and legal age for enrolling students in the first grade of primary school, which is 6.5 years but usually means children enrolling in the 1st grade at 7 years of age with INE using ages 7–12 for primary schools, 13–15 for middle school, and 16–18 for grades 10–12.

Gross enrollment rates for the same level are very different. The SE reported 367,600 students of various ages enrolled in grades 7–9 (367,600 students enrolled for the 2009 school year/population of 562,743 people 12–14 years of age = a gross enrollment rate of 65.3 % in grades 7–9 for the 2009 school year), which increased by 4.9 percentage points to 70.2 % by the year 2010. The gross enrollment rate is not an indicator of efficiency and is used less frequently by international organizations for comparing the enrollment or coverage rates among countries, but gross enrollment rates are very useful for understanding the total coverage of education systems and improvements in access for many developing countries.

With the examples above, the gross enrollment for grades 7–9 in Honduras is 70 % higher than the net enrollment rate. It is not probable that enrollment rates will increase significantly for youth from higher-income families, who tend to begin school at more appropriate ages and have higher levels of academic achievement, with lower failure and dropout rates. The most significant opportunities for increasing enrollments and reducing poverty are with lower-income and rural youth, but many of these young people will not be counted when using net enrollment rates because these students tend to be overage by the time they reach lower and upper secondary education.

In summary, while net and gross enrollment rates can be similar in more developed countries, many children in less developed countries are not enrolling in the 1st grade at an appropriate age. Students leave and return to education systems for economic, health, and other reasons, and with high repetition rates in many developing countries, there are more overage students, resulting in net enrollment rates being a poor indicator for measuring the coverage or improvements in the equity of education systems for many developing countries or for attracting investments to employ a growing young workforce.[26]

Nevertheless, the Poverty Reduction Strategy (*Estrategia para la Reducción de la Pobreza*: *ERP*) for Honduras established the goal of a net enrollment rate in middle school (grades 7–9) of 70 % by the year 2015. However, 1st grade students enrolling in primary schools at the age of 6 in the year 2012, under the new law for education to reduce the minimum enrollment age in the 1st grade to 6 years of age, will not reach the 7th grade of middle school until 2018, 3 years after the Poverty Reduction Strategy is scheduled to end. The ages used for calculating net enrollments by the SE and INE omit significant numbers of students, because of different ages for enrolling children in the 1st grade, high repetition rates in the

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With the proposal for EFA-FTI, the SE lowered the minimum age for enrolling in the 1st grade to 6 years, and with the new education law for Honduras in the year 2012, the legal age for enrolling in primary school was reduced to 6 years of age. This should result in both the SE and INE using the same ages for calculating net enrollment rates with ages 6–11 for the net enrollment rate in primary schools, 12–14 for grades 7–9, and 15–17 for grades 10–12. Both options for age-appropriate enrollment, however, have had large omissions of students who are either under- or overage.

[26] For comparisons of net and gross enrollment rates of countries, see education statistics with country profiles at www.worldbank.org. For comparisons of net and gross enrollment rates in Honduras, see Tables 49.6 and 49.7.

Table 49.6 7th to 9th grade net and gross enrollment rates

	Data from the SE
Net enrollment rate	38.3 %
Gross enrollment rate	65.3 %
Students enrolled	
Net enrollment	215,570
Gross enrollment	367,600
Increase in students enrolled with the gross enrollment rate in grades 7–9	+152,030 (+70 %)

Sources: SE, *Censo de Centros Educativos*, *Año 2009*, and population data from INE, *Proyecciones de Población 2001–2015*

early grades of primary education, and some students leaving and returning to school – resulting in many students being overage by the time they reach middle school and high school.

The new development plan for Honduras from 2010 to 2038 also established national goals for net enrollment rates with a 100 % net enrollment rate for grades 1–9 and 75 % for high school. The goals are inappropriate because of the large omission of students with net enrollment rates, the time it will take for students to receive the benefits of reforms and improvements in primary education and middle school, and reach the 7th to the 12th grades, and with curriculum reforms in upper secondary education only beginning.

In addition, the poverty rate is high (68 %) and many lower-income children have experienced nutrition problems, which can result in children being smaller. Under these circumstances, parents often wait until a child is 7 or 8 years of age before sending them off to school. These students are not enrolling in the 1st grade at the age of 6, especially in rural areas where students must walk longer distances to reach school and in some urban neighborhoods with security problems, resulting in further problems for tracking improvements in the enrollments of lower-income and rural students with net enrollment rates. Table 49.6 provides a summary of the comparison of net and gross enrollment rates for middle schools (grades 7–9).

Table 49.6 compares gross and net enrollment rates for middle school. Based on the net enrollment rate, achieving the ERP goal of an enrollment rate of 70 % would not be possible, but the net enrollment rate omits 152,000 students enrolled in middle schools and had increased by less than one percentage point to 39.2 % from 2009 to 2011. With the gross enrollment rate from Table 49.6, enrollments increase significantly and a gross enrollment rate of 70 % for grades 7–9 was achieved during the 2010 school year.[27]

In summary, achieving a 70 % enrollment rate for a goal related to the ERP with a gross enrollment rate is not a problem, but equity issues remain. Equity rates for primary schools in Honduras are high (Table 49.2), but things change rapidly after

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[27] Net and gross enrollment data from the SE and cited by Van Steenwyk and Sierra Fonseca, *Op. Cit*.

Table 49.7 High school net and gross enrollment rates

	Data from INE	Data from the SE
Net enrollment for ages 16–18	27.7 %	
Students	174,240	
Adjusted gross enrollment (grades 10–12)		49.9 %[a]
Students		266,910[a]
Increase in students over net enrollment		+ 92,670
		+ 53 %

Sources: INE, *Encuesta Permanente de Hogares de Propósitos Múltiples* (September 2010) for the net enrollment rate; gross enrollment for the 2010 school year from the SE and the adjusted gross enrollment rate of 49.9 % calculated by the author based on data from the SE and cited in Van Steenwyk and Sierra Fonseca, *Op. Cit*.

[a] The adjusted gross enrollment rate compensates for the students in 2-year academic programs of study, with students graduating in the 11th grade, and the majority of the students in 3-year programs from the 10th to 12th grades. The adjusted gross enrollment rate is used for comparisons with the net school attendance rate reported by INE for young people 16–18 years of age (3 years)

the 6th grade, with more probability for urban youth and young people from wealthier families being enrolled in middle school as compared to youth from rural areas and lower-income families (Tables 49.3 and 49.4).

Upper Secondary Education (High School): Grades 10–12

Honduras established a goal for 50 % of the young people completing high school by the year 2015, which is a gross graduation rate. This can be achieved with the gross enrollment rate for grades 10–12 of 49.9 % during the 2010 school year (Table 49.7). The gross enrollment rate for high school also shows that the country is beginning to meet the thresholds established by the United States Agency for International Development (USAID) for competing in the twenty-first century and the International Institute for Applied Systems Analysis (IIASA) for higher rates of economic growth.[28]

Table 49.7 compares the net and gross enrollment rates for upper secondary education (grades 10–12) and shows a difference of 92,000 students.

Table 49.7 shows significant differences in net and gross enrollment rates for high school, with the gross enrollment rate being 53 % higher than net enrollments. Data from the SE on net rates shows even greater disparities because the students currently in high school were not affected by the reform to reduce the initial age for enrolling in the 1st grade of primary school or improvements in primary school retention and reductions in repetition rates in recent years. It will take time for these students to reach grades 10–12 in significant numbers.

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[28] USAID, Bureau for Global Programs, *Strategic Plan for the Center for Human Capacity Development* (1995): 90 % completing primary education and 50 % of the youth completing high school to compete in the world economy in the twenty-first century; IIASA and the Vienna Institute of Demography, *Op. Cit*. recommend universal primary education and 50 % of the youth with secondary education for achieving higher levels of economic growth in Honduras, Guatemala, Kenya, Rwanda, and Uganda.

Equity and Efficiency

Expanding access in the provinces and communities with the lowest coverage for secondary education is not the only challenge. Many of the regions with the lowest middle and high school enrollments are also making less progress with improvements in the quality and efficiency of primary education, and expanding access to the 7th or 10th grade will not help if students are not completing primary school.

Other inequities are associated with the socioeconomic status of families. Table 49.2 shows high enrollment probabilities for children from both rich and poor families in primary education, with similar enrollment rates and a high degree of educational equity for primary schools. In secondary education, young people from the 40 % of the wealthiest families have 7.5 times more probability of being enrolled as compared to youth from the poorest 20 % of the families. Students from the second quintile have twice as much probability of being enrolled, and youth from the 20 % of the families with the highest incomes have 8.5 times more probability (Table 49.3). The World Bank reports similar inequities for other Central American countries.[29]

Higher personal costs for studies after the 6th grade of primary school (textbooks, uniforms, notebooks, contributions for the security and maintenance of schools, etc.) contribute to lower enrollment rates for youth from families with lower incomes. Higher opportunity costs after primary education, with the need to work, also reduce probabilities for enrollment by young people from lower-income families. While scholarships can help, there are limits to the amounts of financial assistance that a developing country can provide, and scholarships will not resolve all of the problems with higher opportunity costs for low-income youth and the need to work.

The efficiency of secondary education is also an equity problem, affecting students from lower-income families to a greater extent than youth from higher-income families.[30] Table 49.8 summarizes dropout rates from the 7th to the 11th grade from the year 2009 to 2011.

Table 49.8 shows high dropout rates from the beginning of the 7th grade to the beginning of the 11th grade, the loss of 43 % of the students, and the highest

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[29] World Bank, *Central America Education Strategy – An Agenda for Action* (2005).

[30] *Ibid*. For more recent data on dropout rates, failure, and lower student achievement for lower-income students in Honduras, see Mario Alas y Germán Moncada, *El Tercer Ciclo de Educación Básica – Línea Base Respecto a Implementación del DCNB y Factores Asociados con el Rendimiento Académico* (SE, USAID, American Institutes for Research and CIDEH, 2009).

Table 49.8 Projected dropout rates from the 7th to the 11th grade

Grade	Gross of students enrollment/	Population	=	Gross enrollment (%)	Loss of students[a] (%)	Number dropping out
7	146,778	191,951	=	76.5		
7–8	118,367	188,098	=	62.9	−16.7	−24,448 (7°–8°)
8–9	102,455	183,958	=	55.7	−10.7	−12,716 (8°–9°)
7–9	367,600	564,007	=	65.2	−25.3	−37,164 (7°–9°)
9–10	95,170	174,941	=	54.4	−4.6	−4,715 (9–10)
10–11	72,512	169,769	=	42.7	−21.7	−20,700 (10–11)
9–11	167,682	344,710	=	48.6	−26.7	−25,415 (9–11)
12	Not applicable with some students graduating in the 11th grade					
7–11	535,282	908,717	=	58.9 %	−42.6 %	−62,579[b]

Sources: SE, *Censo de Centros Educativos*, *Año 2009*. Population data by ages from INE, *Proyecciones de Población 2001–2015*

[a] Projections of dropouts are based on gross enrollments for each grade from the 2009 census of schools −2.7 % annual population increase of school-age youth in the 7th to 11th grades. Projections of dropout rates are used because cohorts are distorted with significant variations in the reporting of data by public and private secondary schools from year to year

[b] 37,164 dropouts from the beginning of the 7th grade to the beginning of the 9th grade + 25,415 dropping out in high school = 62,579 dropouts

dropout rates from the 7th to the 8th grade (17 %) and grades 10–11 (22 %), indicating curriculum articulation problems from the 6th to the 7th grade and from middle school to high school.[31]

In summary, while Honduras has access problems after the 6th grade, the inefficiencies and inequities of education from the 7th to the 11th grade are also evident, with an accumulated dropout rate of 43 % and more than 60,000 students dropping out of school from the 7th to the 11th grade as compared to an average dropout rate of less than 1 % per grade in primary schools. Quality and efficiency problems deserve much more attention, and with improvements in these areas, more young people could be expected to continue their studies through middle school and high school. Economic and geographic parity are also concerns. Enrollments favor urban youth and young people from wealthier families, while dropping out of school, insecurity, and cost issues affect lower-income students to a greater extent than students from higher-income families.[32]

Nevertheless, there are opportunities for improving student achievement and reducing failure and dropout rates for students from both poor and wealthier families. A recent study used standardized test results from grades 7 to 9 to identify the factors associated with higher student achievement and reduced failure and dropout rates.

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[31] Curriculum articulation is improving with a new curriculum and standards aligned with international standards from the 1st to the 11th grade, but the full implementation of the reforms will take time.

[32] World Bank, *Central America Education Strategy*; INE, *ENDESA*; Alas y Moncada, *El Tercer Ciclo de Educación Básica*; and Marx, *Op. Cit.*

By implementing these strategies in more schools, dropout and failure rates can be reduced.[33]

Lower-income and rural students, however, will need more alternatives to continue their education while working or attending families for further reductions in socioeconomic inequities. Alternative delivery systems follow the same curricula as traditional middle schools and high schools, but with distance learning, recorded lessons, and support from educators and community volunteers, allowing young people from lower-income and rural families to work and attend families while continuing their secondary education. National standardized test results also show that student achievement in alternative systems is similar to student achievement in traditional schools, which helps justify further investments in these delivery systems and other alternatives for providing greater access to secondary education for low-income and rural students.

Conclusions

The purpose of this chapter was to examine the challenges and opportunities for improving socioeconomic equity and reducing poverty with planning for investments in education to achieve higher levels of equity in education. Honduras used as an example is facing a special window of opportunity offered by demographic changes with a growing and better educated young workforce and reductions in dependents. The country, however, is also in danger of not being able to attract sufficient investments for improving employment opportunities and salaries. Two out of three people are living in poverty (68 %), 51 % of the workforce is unemployed or underemployed, and exports depend on the economic situations in the regional and world economies. Other challenges are related to reforms for improving educational equity, quality, and efficiency, which could prevent the country from taking advantage of a demographic bonus.

Information for Education Planning

The net enrollment rate for middle school and high school in Honduras shows that the country has the lowest coverage rate for secondary education in Latin America (34 %, Table 49.5). The net enrollment rate suggests serious problems with *access* to secondary education and little hope for improving socioeconomic equity with increased numbers of graduates or a better educated young workforce – unless additional resources are provided to expand coverage. This projects a negative future for a country, with social, economic, and political repercussions within the country, and for attracting investments to improve incomes by providing better employment opportunities for young people. The net enrollment rate for lower and upper secondary education in Honduras, however, omits nearly 245,000 students enrolled in middle school and high school (Tables 49.6 and 49.7).

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[33] The factors identified for increasing student achievement and reducing failure rates include the following: the use of the SE's new curriculum (Currículo Nacional Básico: CNB); support materials for the CNB (curriculum calendars, academic standards, and formative assessments of student progress); the use of textbooks based on the CNB; active and participatory pedagogical strategies; assigning teachers specialized in the subject areas in which they are to teach; middle school principals providing pedagogical leadership for teachers; and the participation of parents in the education of their children. The study also measured the effects of the strategies with students from different socioeconomic levels, and the strategies were shown to have positive effects for students from all levels of society. See Alas y Moncada, *Op. Cit*.

Net enrollments in many developing countries are not appropriate indicators for recording improvements in the equity of education with low-income and rural youth, because many of these students tend to be overage when they reach secondary education. When gross enrollment rates are considered, access to post-primary education is much less of a problem. The gross enrollment rate of 70 % from the 7th to the 9th grade in Honduras should result in 70 % of the young people completing the 9th grade and more than 50 % of the young people could be completing high school to achieve goals related to the country's Poverty Reduction Strategy by the year 2015. Moreover, with 50 % of the youth completing high school, Honduras would be meeting the thresholds established by IIASA and USAID for competing in the twenty-first century and achieving higher rates of economic growth. These outcomes present a much more optimistic future for the country, just as the window of opportunity for a demographic bonus is beginning, with the need for additional employment opportunities and higher incomes for a growing and better educated young workforce.

In summary, the data from Honduras shows how net enrollment rates can distract attention from efficiency, equity, and quality issues and overestimate access problems. This might help attract international assistance for capital investments to improve access, but it also results in a serious misunderstanding of the challenges facing an education system. With gross enrollment rates and indicators for efficiency and quality, equity becomes a key issue because higher repetition and dropout rates, lower student achievement and enrollments are evident for young people from families with limited economic resources.

These are more sensitive issues for teachers and administrators than expanding coverage, because they will require a focus on improving coverage, quality, and efficiency with equity. The challenges may be more difficult to resolve, but should not require large injections of additional funding from national or international sources. Reforms in these areas could help Honduras achieve further improvements in the education level of its young population to attract investments and technology transfers, improve employment opportunities and incomes for a growing young workforce, and improve probabilities for receiving the benefits of a demographic bonus with reductions in socioeconomic inequities.

Policy Recommendations

Honduras should be able to achieve 95 % coverage for 1 year of preschool education before the end of the current decade with children receiving the preparation they will need to be more successful in the early grades of primary education. New curricula for middle school and high school are only beginning to be introduced, but Honduras could also have the new curricula for secondary education fully implemented by the year 2025. Under these assumptions, children enrolling in the 1st grade in the year 2019, after having completed 1 year of preschool education in the year 2018, should be reaching the 7th grade of middle school by 2025 and graduating from the 12th grade of high school in the year 2030. Based on these projections, net enrollment rates for secondary education should be showing significant improvements from about 2028 to 2038, and a net enrollment of 6–75 % in high school may be achieved by the year 2038.

However, half of the 25-year window of opportunity for a demographic bonus from 2015 to 2040 will have passed by the year 2028 (Fig. 49.1), and Honduras would be reporting discouraging data on net enrollment rates in high school from 2012 to 2028. Potential investments for improving employment opportunities, reducing poverty, and taking advantage of a demographic bonus could be lost with discouraging data on the country's goals in education – and net enrollment rates from 2012 to about 2028 would suggest low levels of education for a growing young workforce. To address these problems, the following recommendations should be considered:

- Replace net enrollment goals with gross graduation rates on each level of education from preschool through high school.
- Use net and gross enrollment rates with other benchmarks to track progress on improving the quality, efficiency, and equity of education.
- Establish more ambitious goals for academic achievement based on standardized test results, while assuring that preservice and in-service teacher training programs share accountability for achieving goals, with incentives for achievements.
- Disaggregate data on benchmarks and goals by provinces and municipalities, rural and urban areas, and the socioeconomic status of families to help local education leaders and civil society indentify and address the constraints that are preventing some provinces and municipalities from achieving national goals in education.

The justifications for the reconsideration of the goals for education in the National Development Plan for Honduras are the following:

Ambitious and Realistic Goals: One of the greatest challenges during the twenty-first century for developing countries is attracting investments for improving employment opportunities and incomes. Countries reporting discouraging data on the education levels of a growing young workforce will find it more difficult to attract investments for improving employment options and reducing poverty – although other data from the country might show more encouraging improvements in education, as in the case of Honduras.

Preschool and Primary Education: Net enrollment rates can be useful as benchmarks towards achieving the final goals of graduating from primary school and subsequent levels of education at an appropriate age, but reducing the high repetition rates in the early grades of primary schools in Honduras will take time.

Middle School: Net enrollment rates in middle school are affected by the high repetition rates in primary education, with overage students and some young people dropping out of school for a year or two, before continuing their studies in middle school and graduating from the 9th grade.

High School: The discouragingly low net enrollment rates in high school are associated with youth not being able to enroll in middle school or the 10th grade at an appropriate age (Tables 49.5, 49.6, and 49.7). It is not realistic to expect that the problem of overage enrollments in high school will be resolved rapidly. More encouraging net enrollment rates could be observed in Honduras by the year 2028 after the full implementation of the new curriculum in primary schools during the current decade and the new curricula in middle school and high school by the year 2025, with about 95 % of the children enrolling in the 1st grade of primary school after 1 year of preschool by the year 2019 and graduating from high school in the year 2030. In the meantime, however, with national goals based on net enrollment rates for high school, Honduras would be reporting very low enrollments rates in secondary education, discouraging investments for improving employment opportunities for a growing young workforce with limited options for employment.

Academic Achievement: The National Development Plan for Honduras established the goal for increasing student achievement based on standardized test results to 70 % by the year 2038 over a 25-year period. This will make it difficult to attract investments for improving incomes and employment opportunities.

Honduras has developed standardized tests, aligned with new curricula from primary education to high school. Standards are aligned with regional and international standards, but student performance on the new standardized tests is still very low. With the opportunity for a demographic bonus from 2015 to 2040 and the need for more employment opportunities for a growing young workforce, consideration should be given to increasing student achievement to at least 80 % on national standardized tests for attracting investments and improving employment opportunities.

Until the new curricula are fully implemented on each level of the education system and teachers develop the pedagogical skills for all of the content of the new curricula, however, progress towards improving student achievement will not be the same on each level of the education system (primary education, middle schools, and high schools). Indicators for student achievement should be established for each level and grade of the education system, based on the anticipated implementation of the new curricula to help concentrate attention on each level of the education system as curricula are implemented.

Final Considerations

Establishing ambitious goals in education for a school, community, or a country is an important step towards transforming inequitable education systems, but goals must also be aligned with other development benchmarks for attracting investments, when a young workforce is increasing more rapidly than employers can absorb. Goals must also be realistic and understandable for parents, students, civil society, and educators. Achieving goals for improving net enrollment rates in countries like Honduras will take time. Many parents and communities might not understand the importance of net enrollment rates or how they are calculated, but virtually everyone understands the importance of completing primary and secondary education, and the calculations are relatively simple.

Ambitious but realistic and understandable goals are also needed so that teachers, leaders in education, students, parents, and communities will be able to monitor local progress towards meeting national goals and see more immediate results for their efforts. By establishing goals for gross completion rates on each level of the education system and more ambitious goals for academic achievement, Honduras should be able to demonstrate more positive trends towards preparing a large young workforce with higher levels of education for improving employment opportunities and incomes.

Accomplishments towards achieving national development goals and improving the equity and quality of education in countries like Honduras should be the primary focus for establishing goals and benchmarks and prioritizing investments in education to set a National Development Plan in motion – with local participation in monitoring the progress of each school and community towards meeting national goals.

Chapter 50
The Overpowering Role of Policies in Constructing Social Identities of Children with Disabilities

Maha Damaj

Introduction

The chapter investigates the current Lebanese social policy and practices concerning children with disabilities in general and children with visual impairment in particular on the social construction of disabling identities. The chapter contains the findings of a study that was conducted through an organisational ethnography of a residential institution for children with severe visual impairments, supplemented by interviews with the children, some members of their families, teachers, staff and alumni from the institution, as well as participant observation sessions at integrative settings, and interviews with parents and activists pursuing inclusion. The analysis explored the influence of the existing legislation and policy on practices and service provision, and the impact of these practices on the self-identities of children with disabilities. Theoretically, the analysis drew on Foucauldian ideas of power, control and surveillance and applying Goffman's concepts of stigma and the concept of a total institution. The findings show that rights-based legislation cannot on its own result in inclusive changes of policy and practice. In the absence of implementation mechanisms, practices remain predominantly exclusionary, with no effective mechanisms for the meaningful participation of parents or children, eventually socialising the children into disabled identities. Children 8–12 years of age were not exhibiting any noticeable resistance to the systems of control and had adopted the discriminatory values relating to disability exhibited around them.

As such, this chapter looks into a specific aspect of social injustice: discrimination. Dominant social constructions of children with disabilities, frequently discriminatory in their disempowerment, emerge as the main fuel hindering inclusive legislation

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and progressive empowering education and training. What's more, this practice of discrimination further propagates social injustice by socialising children with disabilities into 'spoiled' identities.

This chapter, which is drawn from original research, will present a brief outline of the legal backdrop and the institutional setting to provide context for the discussion of identity formation among institutionalised children with severe visual impairment.

Research Methods

This is a qualitative research study in which an organisational ethnography was undertaken within one institutional setting with additional limited participant observation and interviews in two other educational settings and some homes of children. The participant observation involved taking the role of a visiting volunteer teaching assistant/helper within the institution for some months. A number of individual and group interviews were completed with teachers, children, alumni and family members. The material was analysed through content analysis with lower-order and higher-order categories. These methods were chosen as the most effective way to elicit the voices of these children, their teachers and family members. Additionally, policy materials were drawn upon to place these experiences and practices within the current policy setting in Lebanon.

Actively involving the main study subjects children or persons with disabilities as primary informants enhanced the *validity* of the research. For example, in their research with children, Mahon et al. (1996) found that it is 'neither theoretically nor methodologically appropriate to rely on proxies to represent the views and experiences of children' (Mahon et al. 1996: 146). The individuality of children and the diversity of family situations implies that 'valid accounts of children's attitudes and experiences (can) … only be obtained by engaging directly with the children (and by) treating them as independent actors who (are) engaged in negotiating a complex set of relationships and loyalties' (Mahon: 148). Participatory research with children has provided insights into the lives of children and communities that were inaccessible through traditional research methods, and has gained a rapidly developing body of resources outlining tools and methods to ensure the meaningful participation of children in research (Boyden & Ennew, 1997; Johnson et al., 1994; Laws & Mann, 2004; Lewis, 2000; Save the Children, 2003; van Beers, 2002).

The main subjects of this study are children, and child-focused research raises several *ethical issues*. The aims of the research need to be made as clear as possible to the children to address concerns about obtaining proper consent from the children for taking part in the research. There is a need to avoid raising expectations among the children that the research, or their involvement in it, would be succeeded by any type of change in their situation (Mahon et al. 1996).

Research Setting

The main case study site for this research was an institution, where ethnographic fieldwork was undertaken in addition to group and individual interviews. It is also the only setting where services are subsidised by the government. More limited participant observation and interviews were conducted in two other settings: a centre with an integrative programme and an inclusive school.

As the main study site, only the institution is described here in some detail:

The BAL School for the Blind[1]

This school was established in 1957 through the work of the Lebanese Society for the Blind, which was co-founded by the country's First Lady at the time. The school came into being with donations from the government and individual donors and still greatly depends on government subsidies and donations as a main form of income.

Its enrolment has increased from around 20 students in the 1960s to a student body size that exceeds 100 at the time this research was conducted. The curriculum spans pre-school to baccalaureate level and goes on to offer assistance in college entrance exams or vocational training. It also provides an avenue to integrate some students into mainstream public or private schools at the secondary level, whereby the students are given additional coaching, teaching aids and tutoring by the school's staff. The school operates mainly as a boarding school and is attached to its sister school, a school for the deaf, on the same campus.

To this day, BAL remains the only national educational service offered to children with visual impairment that is subsidised by the government.

The Legal Backdrop: Law, Legislation and Policies in Lebanon

The current disability law in Lebanon is Law 220/2000 'Rights & Access for the Disabled', which was finally passed by the parliament in May 2000. The law reflects the great influence of the *World Programme for Action Concerning Persons with Disabilities* (UN General Assembly, 1982) and the *Standard Rules on the Equalization of Opportunities for Persons with Disabilities* (WHO, 1993). This Law 220 addresses issues such as physical access, education, provision of social services and equal opportunity employment. It also extends to producing a national register of all individuals with disabilities and creating a 'National Committee for Disability Affairs' which would include persons with disabilities. It is worth noting here that although the law highlights the responsibilities of the varied relevant sectors and cuts across them, it did not manage to break the traditional practice of assigning disability issues primarily to the Ministry of Social Affairs (MoSA), a trend that is mostly unchanged to this day.

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[1] *The name of the school and the interviewees cited in this chapter have been changed.*

Additionally, the law also took several measures to address prior discriminatory legislation that prevented persons with disabilities from registering in vocational training centres or applying for employment. Other new issues that were raised by Law 220 dealt with housing and the accessibility of the physical environment, which were not previously included in any other legislative framework in Lebanon. The law proposes that a building code of minimum standards be developed by the National Committee and is then included in the legal conditions for contractors. Furthermore, the law not only specifies that all public buildings and new construction must be accessible but also asserts that all new housing projects must set out sections that are available for purchase by persons with disabilities.

The law is lauded for being the first of its kind to strongly and clearly address issues of discrimination towards persons with disabilities. In each of its sections, it is asserting that all aspects of daily life and governmental decision-making must take into consideration the segment of the population that is disabled. As such, measures such as employment quotas and housing allocations and loans are considered stepping stones towards equal opportunities for persons with disabilities.

Where children are concerned, the main section that directly addresses them is that of education and sports. The section details the right of all children and adults to be admitted into all schools and educational centres and proposes measures for adapting formal examination formats and schedules to be suitable for each student. It also asserts steps towards raising awareness among the student population as well as training for the teaching staff. In terms of exemption from fees, article 61 in this section specifies that fees for tuition, sports, social activities and medical needs will be covered by the government for all students choosing to attend a specialised centre or institution, a request that is processed through applications submitted and approved by the MoSA.

Despite these major advances, however, Lebanese legislation and policy concerning persons with disabilities remains broadly exclusionary, despite the rights-based rhetoric that has been adopted. Upon close inspection, a number of contradictory measures emerge. The broad by-line of its sections calls for the rights of persons with disabilities to medical services, employment, education, recreation and housing with considerations of access to the physical environment and transportation, but these rights are then interpreted by concepts of services and allowances that carry traditional, discriminatory constructs of welfare and needs. The expressed intention is to avoid segregation, while the actual practical measures subscribe to modified versions of labelling and surveillance, such as marked housing, employment quotas, special education classes and disability card holders. Therefore it is unclear if Law 220 can promote inclusion.

Despite all adopted precautions to ensure non-discrimination, some of the proposed measures in Law 220 were only a slightly evolved form of the traditional discriminatory attitude towards persons with disabilities. A case in point is the section on housing which, though it suggests methods for facilitating housing loans, proposes creating separate housing for persons with disabilities within housing projects (article 55). These buildings are also to be tagged with the universal disability sign (article 55.d), which for all intents and purposes will serve only to create ghettos of persons with disabilities. Whereas including this section in Law 220 is an improvement on the total absence of this issue in previous disability laws, the final format may not be empowering to persons with disabilities in practice.

All in all, Law 220 contains a new rights-based perspective on disability issues and promotes a new social construction of disability that falls closer to the social model than the traditional medical model. However, the subtext of the larger part of the articles still subscribes to a needs-based perspective of disability or easily allows for that interpretation within the bounds of the law. Article 61 of the section on education asserts that all fees will be sponsored by the government for children registered in specialised institutions; promotes segregation and exclusion, which are the current dominant practices; and works against the concept of inclusive education that is raised in articles 59 and 60. Article 62 concerned with the adaptation of formal examinations as per the needs of students with disabilities has been interpreted as setting up separate examination centres within specialised institutions. Formal examinations follow a standardised, centralised process which deliberately assigns students to different examination centres to safeguard against cheating or discrimination. Setting up separate centres especially for students with disabilities not only questions the honour code employed by the examiners and the students during examination but is also exclusionary and confirms the perception that these are special students. Consequently, as with other social services and systems in the country, this initiative is 'grappling with modern concepts of development and at the same time remaining faithful to… traditional value-systems' (Jawad, 2002: 338).

Additionally, the lack of implementation of Law 220 in the years since its approval by parliament in 2000 demonstrates the governmental system's refusal to adopt even the most minimal changes required to address disability issues, that is, any changes to the public and private structures. As a relatively young state since its independence from occupation and foreign mandates, Lebanon has taken great strides in developing comparatively progressive social policies. However, despite the consistent and steady process of evaluation and review undertaken by civil society, these legal advancements have occurred in specific times of reform and relative political tranquility. New legislation for persons with disabilities is no exception. Such laws do not only require legal and financial commitments and changes on the part of the government and its services, but these also have to address existing welfare-minded systems and attitudes. At the present time, Law 220 has done neither.

The current disability law in Lebanon promotes the rights of persons with disabilities rather than their need for rehabilitation and care. This approach is in almost direct opposition to a powerful ongoing tradition of institutionalisation and care, and dominant discriminatory attitudes in society. In the text of the law itself, economic allowances have been maintained for institutionalisation; other essential steps that would contribute to altering the status quo, such as supporting schools financially to include children with disabilities, are not specified. Despite arrangements being made to allow visually impaired students to sit for official examinations, their teachers at BAL do not trust the resulting grades and remained sceptical of affirmative action measures that had started to appear as a result of Law 220/2000. In other sections, such as housing, deep-rooted ideas regarding segregation are blatant. The text itself appears to be the outcome of a struggle to find compromises between the existing systems and the international conventions that the government has signed and agreed to ratify. Passing the law is considered a victory by disability activists who had lobbied long and hard for the beginnings of a qualitative change in the perception of disability in government agencies. It is clear that this transformation remains in its early stages, and though lobbying for the implementation of the law has not been facilitated by current political events, it continues to provide a foothold from which additional advocacy for change may be launched. This is needed as the lack of any engagement with the law by several ministries, specifically the Ministry of Finance, indicates that the rights of persons with disabilities remain marginalised within the government's agenda.

It is clear that the practices in the aftermath of this current legislation remain grossly exclusionary for persons with disabilities and more so for children with disabilities. The law subscribes to a rights-based philosophy but has translated this into articles that effectively create parallel systems for persons with disabilities and remove physical barriers. Both of these thrusts have not actually challenged the existing structures of control and surveillance nor the pervasive power relations entrenched at every level. Persons with disabilities have been moved from being marginalised in society to being marginalised in policy. This is evident from the resistance to change within governmental agencies, and the fact that the law has actually reduced the influence of grass roots lobbies through creating a National Committee on Disabled Affairs, and diminished the representation of persons with disabilities through the mechanism of registration for a Disability Card, with grossly low numbers of children and persons with disabilities registered.

A rights-based approach would, in practice, impose a change in the balance of power and the nature of power relations. This approach of rights as universal, indivisible and inalienable can compel policymakers and providers to alter their perceptions of persons with disabilities from 'users' to 'rights holders', from 'addressing the needs of many' to 'ensuring the rights of all'. In effect, such an approach would intrinsically need to allow for channels that would challenge the hegemony of the state and legitimate authorities in promoting individual rights. It is clear that legislation on its own cannot foster inclusion. Legislation and policy need to be backed up with social measures at the field level that actively work towards redefining disability in the society and with capacity building of all service providers in order to recognise the necessary shift in their roles with persons with disabilities. Additionally, persons with disabilities must be empowered, as individuals and as groups, to act as 'watchdogs' monitoring and lobbying for the promotion of their rights.

Within a Foucauldian approach, it would be argued that change can only come about through a process of resistance that transforms power relations (Foucault, 1991). In studying Law 220, and the geopolitical forces and circumstances that continue to prevent it from changing, there will not be any real rights-based changes towards inclusive practice, regardless of the legislation and policy that is drawn up, until persons with disabilities are empowered to take a leading role in the system, and participatory systems of accountability to ensure implementation of legislation are introduced and respected. Additionally, this should not be limited to government-level processes, such as the National Committee for Disabled Affairs, but rather specifically at regional and local levels involving users, parents, service providers and professionals.

The Institutional Setting: Exclusion vs. Inclusion

Studying BAL indicated that it was operating as a 'total institution', with integrative measures appearing tokenistic, at best. Within such a system, opportunities for participation, where they exist, were limited and were delineated within the school's perception of worth, which was mainly by academic achievement or musicianship. Furthermore, the administration had achieved an 'expert' position among parents by corroborating notions of technical expertise in educating, treating, rearing and financially supporting the children's development. This completely stifled resistance from the parents, and by proxy, the children, and nurtured a disempowering dependence on the school in all these matters. Additionally, the director's authority was recognised by all, especially the parents and students, who sought out her assistance as the individual who possessed the most legitimate authority to issue final decisions.

In relation to the immediate surrounding environment, the school population was generally cocooned within the school grounds. Though some teachers expressed their opinions that much awareness raising needed to take place in society in order to change current attitudes towards persons with visual impairment, they did not recognise the inhibitory role to this process that the school was playing. The issue was not only that the school is a 'special school for the blind', which on its own merit falls into predominant attitudes that children with disabilities should be taught in a separate setting, but the school's physical environment was also closed off, thus preventing the community circles around it to learn anything about them. Similarly, during the long periods that the boarding students spent at the school, they received very little exposure to the social world outside their school walls. From a physical space point of view, this setting translated 'segregation' into 'isolation'. Within this environment, surveillance was constant, in the classroom, cafeteria, playground and dormitories. The children were monitored within a regimented time-space schedule, and this surveillance extended to their homes through visits of the psychosocial coordinator and the folders that she maintained for each child, as well as to the regular schools that some of the older students were integrated into.

The principles that have been adopted by the school administration and staff are reflected in all its official protocols, relating to educational and residential guidelines, and in the informal organisation of authority and power propagated by the children and with the parents. The administration presented the school as a special, expert institution in a manner similar to medical rehabilitation centres. Its efforts were focused on rehabilitating the children academically and musically as a means towards compensating for their disability. The curriculum and modules of teaching did not include any adaptations that would make the child comfortable with their impairment, not even in adequately training the teaching staff, but rather urged the child to perform within a non-adapted educational environment. As a result the school was promoting the normalisation of the disability by encouraging the children to overcome it as a means of being able to fit back into society. As reintegration into society was cited as the school's main goal, analysing its exclusive versus inclusive ethos gave some indication as to how effective these measures were for reintegration.

With its educational approach and the control of social space, the administration treated the student population as a homogeneous group, with the inference being that they were similar because they shared the same disability. The only distinction that the administration made among the students was for those who had excelled academically or musically. These attitudes were not challenged by the students.

The school administration had recreated a regular school and sought to train the children to manage themselves within it. This not only applied to the formal curriculum and system but to the attitudes adopted regarding age, gender and disability as well. The children among themselves employed these parameters in their perceptions of who was more powerful or dominant, and these were aligned with the discriminatory attitudes prevailing in society. The most striking was the distinction that was made between children with low vision and those who were severely visually impaired, and the role that the adults played in supporting it by giving tasks to the children with low vision that were not related to their age or academic achievement – factors that teachers usually use when choosing a helper – but solely on the fact that they had low vision. This reinforced the perception of the children with severe visually impairment that their impairment was disabling them.

The teachers maintained low expectations of what the students could achieve after BAL, and alumni claimed that BAL did not prepare them for anything that benefited them later. As the alumni interviews illustrated, whether they succeeded academically at BAL or not, the education that was provided to them proved useless in later years, with a number of them re-educating themselves in profitable occupations.

The school administration therefore primarily subscribed to the medical model of disability and a non-inclusive curriculum. The children did not have legitimate, representative arenas in which to participate, and their informal participation was hinged on their placement within a discriminatory set of parameters. Furthermore, it lays the burden of achievement on the children alone and offered no alternatives to build on the children's strengths if they were not academically or musically gifted.

The parents came to the school with a medical definition of their children's impairments in line with the formal diagnosis. This understanding did not seem to change as they moved their children to another expert institution, one that they considered qualified to make decisions for them regarding the children. This discouraged their involvement in any school issues, which they felt they were ill-equipped to advise on, and fed into their dependence on the school that was not only educating a child that nobody else knew how to teach but was also assisting them in obtaining sponsorship and funding.

From a Foucauldian perspective, it can be deduced that an institution such as BAL was established to 'reform' children with disabilities into acceptable, productive members of society (Driver, 1994; Foucault, 1973). Aside from the elements of segregation and normalisation illustrated by these findings, the strength with which control is exercised throughout the school's practice with children and parents led to imbalanced power relations, so that decisions by the school were rarely challenged. There was no room left for resistance, and whatever the children managed within the school grounds remained quite restricted to small transient initiatives within informal circles. Those who managed more did so by virtue of status bestowed upon them by values propagated by those in authority, and thus do not really challenge the system.

Additionally, this diminished margin for resistance also hindered the children's ability to disengage from the roles that were being proliferated through their interaction with the teachers and staff. These 'situated roles', as described by Goffman, are symbolically defined by social interaction and ritual order. Analysing the social interaction among students and teachers in this chapter has indicated that the formal and informal organisation of this institution inhibits participation and acts upon the premise that being disabled is a weakness stemming from a deficiency. There is a finality to their perception of this deficiency, as expressed in their interviews and conversations, and this is illustrated in their charitable care for the children and their low expectations for their achievements. Forrester (2002), Mayall (2002), and James and James (2004) research point to the influence of such daily interactions and social dynamics with adults on shaping children's understanding of being a child.

Despite their dedication and hard work, the staff at the school was propagating medical, traditional and discriminatory constructions of disability. The children were being prepared to face the outside world by being taught how to conform to societal constructions and expectations of persons with visual impairment. This socialised the students into a 'disabled identity' rather than the identity of 'a person with a disability'. This is outlined in more detail in the following section.

Self and Other: Disabling Identities

This section presents an analysis of some primary factors that impact on the children's social identities, such as valuing normalisation, devaluing the disability and preset present and future expectations, in addition to exploring how children manifest aspects of their identity formation as a person with disabilities. Based on the data, the argument here is that exclusionary practices of the institution and their influence on the home setting are socialising children into stereotypically inferior, disabled identities. This section thus focuses on the social construction of the children's' identities, while drawing on symbolic interactionism which is influenced by the work of Goffman, who argued that 'the self' is produced by presentations in the social life, which are designed in response to perceptions of one's place in society.

From the point of view of the sociology of childhood, the children's management of their identities would also reflect how they are adapting to their role as an oppressed social group and what modalities they are creating for their participation and agency within that role. Additionally, the field of disability studies is relevant when analysing the social construction of the identities of people with disabilities. Within disability studies there is the individualised medical model of disability and the more recent social model of disability. The analysis of field notes and interviews in this chapter focuses on how the children are identifying themselves and their impairment within their social environment of the home and school through themes such as participation, normalisation, play, role modelling, belonging and self-perceptions.

Normality and Normalisation

When discussing normalisation in this chapter, reference is being made to the dictionary definition of the word – that is, the imposition of a standard – and not to the theory of normalisation and social role valorisation as theorised by Wolfensberger and Tullman (1982). Wolfensberger's assertion was that if culturally normative standards were used to value the role of a traditionally devalued member of society, then that would facilitate their integration and acceptance into society. The theories expand beyond this, with several sociological evaluation tools being developed, but they do not serve the purposes of our research to identify how children are being socialised into a particular role or identity. It is the researcher's standpoint that employing culturally normative standards and working with devalued individuals to excel and fit into them leans closer towards concepts of exclusion, normal versus abnormal, and once again lays the onus of change on the devalued individual rather than on the social environment.

It is argued here that the children are being socialised into stereotypically inferior identities, in other words, disabling identities. The distinction between this and 'identity as a person with a disability' is that the former subscribes to a group identity constructed of discriminatory social perceptions that are disabling to the person, whereas the latter is a process of self-reflection illustrated in stories of individual identity of persons who happen to have an impairment. From the varied data, themes of normalisation, denial and traditional disability stereotypes of weakness and inferiority emerged.

Devaluing Disability

A commonly held view is that people with impairments are incapable of performing up to 'normal' expectations. At BAL, this was evident in terms of the expectations concerning the children's academic achievements.

In interviews with teachers and staff at the BAL, many opinions were expressed that reflected their low expectations of the students. Teachers, who were not trained to teach students with visual impairment, did not have high expectations for their students' academic performance. They were even sceptical of the scores that their students achieved on the official government examinations.

> Teacher 6: And all of this is assuming that they will graduate from here.
>
> I mean, we work our hearts out with some of these students to get ahead in any subject (but nothing…)
>
> 'Who knows how well qualified they will be – they are all passed in their government exams (baccalaureate) without the examiners even looking at their papers.' (Yola)
>
> 'They are not doing any favours for the blind students with the formal exams, where we all know that all blind students definitely pass (no matter how they perform on the exam).' (Mr. Taha)

As discussed earlier, BAL and the teachers consider fostering the children's academic progress as their main role and as such place much emphasis on academic achievement. They consider the optimal course of action to normalise the disability and allow the children to reintegrate into society with peers who are not visually impaired. Similarly, the achievement criteria focus on areas that are considered of high achievement to students who are not visually impaired, ignoring other measures of success and usefulness for persons with visual impairment.

> Teacher 6: Whatever they think of doing, they must go to university. There is no other way they can compete for the same jobs as sighted graduates.
>
> '(BAL) prepared me to go to university and study Mathematics – which I then dropped because I realised that I couldn't do anything with it, not teach or anything.' (Jamil's interview)

It appears that the driving force was to assist the students at BAL to academically overcompensate for their disability in order to be accepted by society. The overcompensation refers to directing the students to fields where success is highly regarded by society, but not necessarily of use to the person with visual impairment. It also refers to fields where the educational staff would not usually expect a student with visual impairment to succeed; thus, any measure of accomplishment feeds into the 'supercrip' image, a triumphant superhuman achieving feats worthy of respect.

These same teachers, however, continue to highlight how disadvantaged the children are in the process of learning because of their visual impairment. They consistently expressed how children with visual impairment cannot learn in the same way as other students, which is true in terms of their need for alternative approaches and educational material, none of which were made available at BAL. As the teachers did not adopt any different teaching methods that could facilitate the process of teaching children with visual impairment, it appeared that their argument was based on the fact that without perfect sight, the children simply could not learn or take in as much as children without visual impairment.

> Teacher 2: (Teaching a child with visual impairment is) absolutely different, a sighted child would understand quicker because he/she is using their sight.

> Mr. Taha: Also, don't forget that the image (the picture) plays a big role (in learning); blind children can't keep up with the sighted children.

> Teacher 6: It is totally different than teaching sighted students. I mean, 90% of what a student gets is from his vision, so the teaching had to be very different. I mean, I would be moving around and gesticulating, but that isn't doing any good. I teach English, and I talk Arabic in class, though I shouldn't, but there was just no other way.
>
> Teacher 4: But you can't keep insisting that the child needs to be treated the same way, they require different type of work.

The doubts of the staff and the administration regarding the children's ability to achieve academically also emerged from the back-up systems that had been set up. Academic performance was paralleled only by musical distinction, which was considered the other path that would be worthy of respect in society for visually impaired persons. Indeed the emphasis that was placed on music by the school administration was evident in the investment in musical equipment and training that exceeded what was made available for academic instruction or any other nonacademic activity. Additionally, whereas academic success was seen as a stepping stone to higher education outside of BAL, and musical talent was similarly a path towards economic opportunities, the only option that BAL offered for failing in both is to direct the students to the handicrafts workshop.

> Omar (alumnus): At BAL, if you're not talented in music, you end up in the handicrafts workshop.
>
> Jamil (alumnus): (The school) told others not to go to university – there's an inclination in all institutions for the blind that the students don't need to go beyond the Brevet (10th Grade). Instead, they would refer them to the handicrafts workshops or train them to work as phone operators.

These limited options for students with visual impairment reflected a conception on the administration's part that these were the only skills that were attainable for people with visual impairments. This slightly restricted vision was also reflected in the lack of any recreational alternatives for students in residence at BAL. Aside from the television set in the main TV room, there were absolutely no other facilities for students to pass their time during their break sessions in the afternoon. All that was available was the space of the courtyard.

> Field Notes:
>
> I was sitting outside with Aida (one of the teachers) during one of the students' afternoon breaks. I had just arrived and it was not yet time for my session with the children. Aida had to attend to something else when I was once again mesmerised by the dull routine movement of the older children, boys and girls, arm-in-arm, walking round and around in circles on the asphalt. When Aida returned, I just blurted out: 'I just want to figure out why they do that – why do they just walk around?' Aida responded: 'What else are they going to do?'

This staff member's response represented the general opinion amongst the staff, that there was really no need to expand on or provide alternatives to what was already available, because there was only so much that visually impaired persons could do in any case. Whether this was born of the staff members' own opinions or was influenced by the system at the school was not clear, but either way the end result was this concept of limited abilities and possibilities for persons with visual impairment. This was probably the root of the supervisors' overprotective nature towards allowing the younger children to play in the courtyard or the outdoor playground equipment, that they would not be able to avoid hurting themselves.

The school staff's attitude towards visual impairment was perhaps best represented in the distinction that they made between children with low vision and children who were completely visually impaired. Within the informal organisation of power among the students, the advantage was assigned to children with low vision. This was not challenged by the staff, and was additionally confirmed by them with errands and tasks being assigned to children with low vision, frequently involving taking care of children who were blind. Through these actions, the staff were distinguishing between those who had some sight to those who had none and were perceiving the former as being more capable and responsible for their actions.

> Field Notes:
>
> Children with low vision can be seen guiding their classmates and younger children to their classes when the bell rings…
>
> In the nursery class, when Yasmina, who is blind, wanted to go to the bathroom, Hussein, her classmate with low vision, was asked to lead her there.
>
> Young Omar is a new addition to the nursery class. He is taller than the others, and extremely thin and weak. As he would normally just stay seated wherever he is lead, one of the dormitory supervisors had asked two older boys with low vision to just walk him around. They did, and when they wanted to move on to something else, they would pass him onto Ayman or Riyad, who also had low vision…
>
> Tony, who has low vision, is always called upon to fetch Leila, his classmate who is blind, and bring her to dinner and take her back to the older girls to take care of her.

The students with low vision, whether they were younger or older or even whether they were considered good performers academically or musically or not, were asked to run more errands than the students who were blind. In seeing the students with low vision as worthy of such responsibilities and as these responsibilities usually involved a student who is blind, the staff were creating a pattern of care for those who were totally impaired by those who were less so. In other words, they were expressing their sense that the capacities of the children were diminished with the acuteness of their impairment.

In all of these actions and traits, the staff at BAL were devaluing the disability by attaching a host of inabilities to it – academically, recreationally and socially. This emerged from their adoption of normalised criteria for behaviour and achievement as is indicated in their classroom methods and in their expectations. Their standpoints were predominantly rooted in the medical model of disability in that their priority was to assist the children in overcoming their impairment in order to be accepted within the 'normal' standards. The absence of any recreational options or facilities suggested that the school administration did not consider these priorities or needs for persons with visual impairment who may not be able to appreciate them and whose primary focus should be on being accepted by society. The administration provided for this by focusing on the students' academic and musical training.

Passing for 'Normal' and Covering

In Goffman's study of stigma (Goffman, 1963), he referred to three strategies that are adopted by the person with disabilities in managing their stigmatised disability: 'passing' for normal and non-stigmatised, 'covering' the stigma so that it does not overwhelm social encounters, and 'withdrawal' from social activities with 'normals' altogether (Barnes et al., 1999). In their daily interactions with their teachers or with the researcher and in their interviews, the children at BAL seemed to adopt all three in different measures and in different contexts. This section will address the first two management strategies: 'passing' and 'covering'.

Analysis of the data showed that the children in their actions and interviews and from the parental reflections on their children, that these children are often attempting to pass for 'normal'. This was especially true of children with low vision who sensed a distinction between themselves and their blind peers and tried to use their limited vision to attempt tasks that could not be achieved by their blind peers. In fact, these acts were sometimes meant to affirm the difference between them and these peers, thus presenting themselves as more 'normal'.

> 'One of the boys with low vision is hunched over so close to his book that it appears as if he is reading Braille with his nose, but it turns out that he is reading it with his eyes.' (Field Notes)
>
> Riyad is being taught Braille so that he has something to fall back on should he totally lose his sight, but I constantly saw him reading it with his eyes instead of his fingers.
>
> Riyad's father: 'I know! I see him reading it – and not with his fingers – and I just go "what are you doing?"'
>
> Riyad: 'I hope to God I never need to use Braille alone because I read too slowly.'

Riyad is respectful and loyal to his friends, many of whom are blind, and would thus make light of comments regarding Braille or other implements that were specific to blind persons, such as the one above. This would be similar to a person with no physical impairment saying that they would probably be bad in a wheelchair because they would keep running into walls. Braille is Riyad's first language of instruction in the only school he has ever attended, and this comment represents a soft attempt to distance himself from it and, correspondingly, from the impairment. During his interview, he would try to explain different situations to me at the school by using phrases such as *'These people (his peers) don't see'* (Riyad's interview), implying that he feels he does. Quite often, these were also the students who were still seeking out medical procedures to restore the rest of their sight.

> Riyad: I had an operation in the summer (possibly for strabismus), and I feel I can see a little better.
>
> His father did not think that these operations were making any difference to his son's sight.
>
> Ayman's Mother: Once, Ayman and I were sitting on the balcony and he seemed deep in thought. When I asked him what it was, he asked me if he could have an operation if someone would donate an eye, and he started crying. I told him that I had asked about it, and if donating an eye would work, I would have donated one of my own. But it doesn't work, it won't solve the problem.

Other students with low vision also used passing as a strategy. They could be seen to be playing games that required sight – and here, reference is not being made to playing soccer or other ball games which most of the students seemed to manage quite well, but to card games and the like, using flat, unmarked cards. These games did not make allowances to include friends who were blind, who were often observed sitting just outside the 'game circle' while the others played.

> Field Notes:
> Outside the room, the boys were playing with their Pokemon discs and Jaafar and Kamal (both totally blind) were there, sitting just around the circle, totally left out. I came up to talk to the children, asked them how they were playing the game, then said that next time, we'll come up with a game that Jaafar and Kamal can play while the others are playing Pokemon. Jaafar and Kamal and the rest of the boys then started coming up with ways that they could adapt the Pokemon discs so that everyone could play.

The children were clearly willing to involve their friends in these games; they had just not thought of the necessity of adapting games to include everyone when those with low vision could play without any trouble. The children with low vision probably found this a reaffirmation of their 'sighted' status, but they were also part of this larger group which included their blind friends. Perhaps they had not thought of ways to adapt their games because there were so few examples of such adaptations at the school for them to be inspired to do so. To some extent, it also implies that these children are striving to play these regular games and be like all other children.

This was again apparent in the preparations for the student council elections. In the weeks leading up to the elections, posters were hung up around the school campaigning for the different candidates, emulating the publicity campaigns of the local MP's. These were neither in Braille or any other tactile material – they were meant to be read, and those who could not read them would need to ask someone to do so for them. The posters were not particularly flashy or catchy and did not include much useful information, so it was not very clear how they served the election process. It appeared as if the students had gone to great lengths to execute the process as normally as possible and had, in the meantime, excluded their peers with severe visual impairment as most processes in the community do.

Aside from the children themselves, other staff or relatives in their lives were also encouraging them to appear as 'normal', whether directly or indirectly. These were mostly their siblings and family, who would take pride in how you could often not notice that their sibling or child had an impairment at all.

> Ayman's sister: If people were to spend time with him, they would realise that he is very normal but we need someone to appreciate that.

Yola is one of the dormitory supervisors who also has a brother at home who is blind. The following is an excerpt from notes taken after spending an afternoon with her.

She takes great pride in pointing out that you simply cannot tell that (her brother) is blind and recounts anecdotes of people waving at him or holding out their hands to shake his, not realising or forgetting that he cannot see them.

And then there are those who bring their friends or fiancées to the store to show them the blind guy.

The siblings were equally aware of when people around them pointed, stared at or mocked their sibling with visual impairment, and they were also managing the stigma by trying to have their sibling pass as 'normal'.

Attempts and motions for 'covering' the disability to stabilise social encounters were more noticeable among the students, and humour was a common tool. The students were constantly making jokes about their impairment, usually for the benefit of an audience who was not visually impaired. In fact, very few of the students referred to themselves as ‘blind’ except in jest.

> Teacher 6: When I first started teaching here, I was so tensed up and so worried, but the students are the ones who helped me. They would keep cracking jokes (about their visual impairment) like ‘I had such a bad headache, I could no longer see’, or bumping into me and saying ‘Oh, sorry Miss, I didn’t see you there’.
> Field Notes
> In gym class, Josette – who is blind – puts on the blindfold (meant for the students with low vision) as well and yells out ‘I’ve become blind!!’

A class role-play between two students in 4th grade was considered hilarious by their classmates because it depicted an incident when a taxi driver yelled out at a pedestrian ‘Can’t you see?’ and she replied, ‘No, I’m blind’, which was met with roars of laughter from the children. What was more striking about the role-play was that it stalled after that line – neither of the students knew how the rest of the conversation might actually go. The outburst of laughter may have also been a release in that the children turned the joke on the sighted driver, that they finally managed to call themselves ‘blind’ as a matter of fact, and not as a cause for sympathy.

The jokes about their impairment were a continuous means to try to make others feel more comfortable around them, and perhaps a defence mechanism to make the joke before somebody else did.

> Field Notes
> In Grade 6 – There are more jokes being made about being blind. They are asked to pick a grammatical element out of a sentence that has Sharon Stone in it. The boys ask about the sentence again and (the teacher) responds: ‘An amazing actress… if you saw her you’d fall over.’
>
> (One of the girls) retorts ‘Miss, he can’t even see her and he’s falling over, if he saw her he’d melt’.

These jokes, however, were not as common amongst the younger students who were struggling to think of themselves as visually impaired. Some, especially those with low vision, had not come to terms with their sight loss at all and would probably have found jokes about their sight hurtful. Not unlike the older students, these children were overcompensating to overcome the disability of their impairment, and this habit extended to their social skills, where all their mannerisms were slightly exaggerated. They spoke louder, reacted impulsively and went to great pains to entertain or attract attention by making jokes or coming up with witty put-downs. These were all typical of pre-teenagers, but they were exaggerated with this group. Furthermore, they never admitted that there was something that they could not know how to do and would often try to prove to you that they could do something. ‘Honestly Miss. Shall I show you Miss? Shall I show you?’ Once again typical of children, but the persistence echoed a need to prove that they were ‘normal’.

If they did admit to any type of incapacity, it was usually attached to elements or services that are lacking or beyond their control. In one of the older students’ performances in their Christmas show, they broached the issue of the rights of persons with disabilities but the persons with disabilities that they depicted was physically disabled and used a wheelchair. The point that they wanted to drive home, that when they spoke of disability they were not just referring to visual impairment was well received. But their arguments for the provisions and services that they felt persons with disabilities deserved in order to overcome their disability were entrenched in the medical model outlook on disability. They were not rights-based, and not empowering. One explanation would be that they drew their world view from the vernacular used in the school, which demanded provisions that would allow the students to surmount their disabling impairment and fit into society.

In light of the attitudes among the staff and adults at BAL that devalued the disability of the students, their attempts to pass for normal or cover their disability may be a direct response to this. However, as family members were also involved in this process, it would appear that this defence mechanism or strategy to manage their stigma was for the benefit of people they had come into contact with outside of the school as well. Several examples illustrated the measures of denial, rejection or even mourning for their impairment, all of which fall into what the medical model of disability would assert as the process of dealing with loss (Shakespeare, 1996). In all cases, the children were attempting to rectify what they now felt was a 'spoiled' identity, one that was deviant and a source of social stigma. Though one factor contributing to this stigma was the wider society and general social interactions, ascribing any part of the formation of this identity to the institution was only apparent when comparing these coping mechanisms with how children with visual impairment who had been included in regular schools, and continued to live at home, dealt with their impairments.

By a rather young age, the children observed or interviewed who had been included in regular schooling illustrated very little shame or stigma associated with their disability. Quite to the contrary, they expressed their affirmation of being called 'blind' and, after a while, tired of and rejected being observed or studied.

> From Naji's home visit:
> When I had first called to ask for this interview, the mother had asked that we meet somewhere outside the house as she did not want Naji to know about this. Naji had, in the last period, become annoyed with the slew of interviewers and students who were coming to write something about him. 'What am I? A showcase?'
>
> This is also the reason why his school no longer allowed such visitors to observe him in class.
>
> (At the end of the interview, his mother) voiced her relief that it was not one of those interviews where the interviewer wanted to watch how Naji ate, or dressed, or did mundane things or the like.
>
> When Naji performed (guitar) at the Presidential Palace, he met the First Lady (he won one of 2 prizes). When she asked him if there was anything he wanted, he said that he would like to see the Presidential Palace, and she took him for a tour and called in the President to see him. In the car afterwards, he told me that he really enjoyed meeting the First Lady, but mostly because when she called the President to come meet Naji, he heard her say to the President that Naji was blind. And Naji was pleased that she just said it as it was and didn't try to soften it up or make a big deal of it.

In preparation for an awareness raising photo exhibition where children were encouraged to take photographs of their days included in a regular school, Rida and Sara who were now at an UNRWA school apparently refused to take part in the exercise at first. Their reasons were: 'We know why you're doing this, because we're blind. Well, there's nothing special about us being blind and we want you to stop pointing us out in that way' (Personal Communication, UNRWA personnel).

These three children fell in the younger half of the 7–12 years age bracket under study and yet had already rejected being labelled as ‘disabled’ without rejecting their impairment. They made no excuses for their impairment and continued to demand that they be treated with respect. Without doubt, factors that facilitated this process for them were not only present at the school but also at home where they continued to live and in the community that they were not withdrawn from.

Whereas the children at BAL were working to achieve ‘normality’ in a detached setting, the included children were, for all purposes, living inclusively at home and at school with their impairment. These children’s experiences and expressions of their disability could lead us to deduce that the institutionalised experience for the children at BAL, with all its components of staff, educational system and family perceptions, was contributing to a sense of spoiled identity and feeding into defence strategies and coping mechanisms focusing on ‘passing’ and ‘covering’. Within such a small school population, there was little evidence of the students employing ‘withdrawing’ as one mechanism for handling their stigma during their school days. It could, however, be deduced that this was more widely adopted outside of the school, with the students who are integrated into regular high schools but do not mingle, and the alumni who return to BAL to live or work.

Self-Perceptions, Aspirations and Role Models

There are a number of elements that impinge on the child’s sense of identity. James (1993), James and Hockey (2007), Kelle (2001), Lansdown (2005, 2006) and others illustrated the effects of language, culture, social perceptions, intergenerational relations and social interaction on the processes that children undertake to make meaning of their world and recognise their role within it. All of these elements appear in the analysis of the interview data to examine the process the children are undergoing in forming their self-identities and self-perceptions. This was certainly the case for children with visual impairment under study. As students in a school where their capacities were underrated due to the staff’s devaluation of their disability, the children would naturally seek to be acknowledged by attempting to do well within the skills that were highly rated at the school. They were simultaneously learning what skills gained them praise.

When setting up the interviews with the children, I had explained to them that I wanted to learn more about them and about how they dealt with things at home and at school. The first interview was with Maroun, who, upon hearing this explanation, immediately asked if I wanted to see how he writes. A Braille printer was brought to our small round table and he delicately explained how to feed in the paper and printed my name for me to feel. (Maroun’s interview)

Kinan, in his interview, did the same. This is what the children felt differentiated them and what they felt they could teach me about how they dealt with things.

No doubt this was a special skill in comparison to their siblings and family members at home who did not know Braille.

The children had started imagining themselves in the future. In their interviews and in their descriptions of what they would like to do when they grew up, the larger part of the children's dialogue reflected a paradox of their rejection or denial of their disability, as well as categorising themselves in traditional disabled roles. Historically in Lebanon and other Arab countries, children with visual impairments were trained to become priests and sheikhs. It was considered important to teach them the Bible and the Quran, and parents guided their children with visual impairment to become priests or sheikhs as it was considered accessible employment that would socially compensate for their disability. In the last 60 years or so, they were also trained to become musicians, language teachers, telephone operators or workers in handicrafts workshops. These became the socially expected lines of work for persons with visual impairment and were propagated by institutions through vocational training that directed them to these professions. BAL is slightly different in its emphasis on academic study especially for the students in the elementary grades, but its focus on music has been previously illustrated, as well as the presence of its handicrafts workshop on hand for those who do not succeed academically or musically.

> Jaafar: 'God knows (what I will be). Maybe teach English, they say that that would be a good thing for me.'
>
> Maroun: 'A music teacher, or a priest'.
>
> Ahmad: 'I want to become a sheikh.'

Perhaps the children had started sensing a level of inadequacy in comparison to non-disabled peers and their responses were seemingly in passive agreement with what others have suggested to them. This was slightly different for children with low vision, who, as mentioned earlier, felt less disabled in the company of their blind peers, which assisted them in denying their disability. Their responses were typical of young children's dreams or were plausible professions outside the group of sanctioned jobs for persons with visual impairment.

> Joseph: 'I want to be an airplane pilot!'
>
> Munira: 'I want to go to university … (and) become a lawyer.'
>
> Ayman: 'I want to become a mechanic because I love cars.'
>
> Riyad (who loves computers): 'I want to open up a computer company.'

The children's explorations of their potential future careers were also affected by the influential persons in their surrounding environment, either directly by their parents' and administration's advice or indirectly by the staff's attitudes to their potential abilities, and the role models available to them through the staff with visual impairment at the school.

The parents who were interviewed had high hopes for their children's futures. They expected that the children's time at BAL would enable them to overcome their disability and be able to pursue further studies or a career that would overcome society's attitude to their impairment. Education and high achievement was seen as key to reintegration and respect.

> Ahmad's father:
> Most importantly, I don't want anybody to pity them. I keep telling them: prove to everyone that you're educated.
>
> I want Ghina to go to university. She wants to study Psychology, but I would like her to study English Literature. I feel she can work with that, she can teach. I want her to have her status in society.
>
> I would like Ahmad to become a musician; I feel it is a good profession.
>
> Upon mentioning that Ahmad said he wanted to be a sheikh, the grandmother responded: That is probably because of me, I would like him to be a sheikh.
>
> Ayman's mother: I wanted him to be an eye doctor or a mechanic because he really likes cars.

The parents, and grandparents, are naturally looking out for what they felt might be in the best interests of their children, but aside from an overambitious desire for a child with low vision to become an ophthalmologist, they all subscribed to the traditional professions assigned to persons with visual impairment. Ayman's mother, in her response, presents hints of denial of her son's impairment, which probably assists her son in doing the same, as indicated in his ongoing hope and quest for medical procedures to eliminate his impairment.

The BAL staff views concerning the children's futures were derived from their experiences with older students at the school. The importance attached to academic studies and music was tangible in that they were the only areas for which they received the highest recognition and were afforded informal power, by the director and by the staff. The proximity of the handicrafts workshop and the workers and telephone operators who shared residence with the students also alerted them to what their other possibilities were should they not succeed academically or musically.

> Omar (alumnus): The handicrafts workshop has generally been for… school dropouts (from BAL or elsewhere) or those who don't like education… At BAL, if you're not talented in music, you end up in the handicrafts workshop.

The educational staff was never observed giving career counselling advice, but their opinions and thoughts as to the students' future prospects probably filtered into their attitudes and instruction in class. In all fairness, these views were not necessarily their personal opinions as much as they represented a synthesis of where they thought society would accept visually impaired employees.

> There was a long pause among the teachers in their group interview when they were asked what career choices they thought their students would have. Finally, there were only a few suggestions…
>
> Teacher 6: I only see them working as phone operators (which others – mainly the blind teachers – argued with).
>
> Teacher 7: They are going to have a lot of better job opportunities because everything is computerised now. I know someone who is working as a translator, someone is working at ESCWA. There are opportunities. Which would hopefully improve in the future.
>
> Teacher 6: They could go into computers.

The teachers did not seem to have given the students' future much thought beyond what has been set out by the administration and society in general, and remained sceptical of affirmative action measures that had started to appear as a result of Law 220/2000.

> Teacher 3: Yes, but look at how it's (Law 220) being implemented in some places – blind people are getting paid (employed) without being given a job to do. It's just as bad as begging.

These are the same teachers who barely expected that their students would graduate. For those who would, the teachers did not seem particularly hopeful of the opportunities that would be made available to them.

> Mr. Taha (blind teacher): You don't think of what you want, you just think that you need to work. I know two people who had Master's degrees, and now they're just working as phone operators.

The teachers with visual impairment at the school mainly taught music or languages, Braille, English or Arabic, with the exception of one who runs the computer classes. They constituted the students' immediate professional role models and were respected in accordance with the higher importance ascribed to the educational staff at BAL. It was these very same role models, some of whom were BAL alumni, who had returned to teach at their alma mater. Not only did they follow in a traditional profession, but they also preferred to pursue it in a special school. This contributed to the children's sense of belonging at BAL, which will be discussed further in the following section, but also reaffirmed some of the opinions that had been expressed to them regarding the limitations of their future opportunities.

Marriage seemed to preoccupy the girls more than the boys. Specifically in this area, the students looked to the staff with visual impairment for clues as to what they might expect. Of all the staff with visual impairment at BAL, only two of the teachers were married, one of whom, a female, was married the year that the data collection was conducted. All the other staff, visitors and alumni with visual impairment that the students came into contact with remained unmarried.

> Yola (dormitory supervisor):
> She mentions that the girls at (BAL) are always thinking of when they get married. Thoughts similar to those that would occupy the minds of any average teenager. She feels that all the possible obstacles or challenges in doing something like that doesn't occur to them, and they raise the issue whenever they have an outside speaker 'Why are our chances to get married so low when they are not for boys?'
>
> People also urge Yola to find a bride for her brother. She feels that she cannot pass such a burden on to somebody else.

Nobody seems to have provided a clear response to the girls' persistent questions, almost as if, as indicated by Yola above, they should recognise the clear hindrances. In the children's interviews, the two girls in the sample group were the only ones to bring up the issue of marriage, but with an interesting condition – 'I would like to get married, to someone who is not blind*' (Samia).* When I enquired why they specified this quality in their potential spouse, their non-verbal retort indicated that it should be intensely obvious; the girls wanted to marry out of the discriminatory perception of their disability, this was one way to break the endless cycle and provide them with a less limited life in the mainstream.

All the guidance and information that the children received regarding their future role in the society's economy fell within the existing system that had made allowances for persons with visual impairment in a few professions. When opinions emerged to challenge this system, they were usually unrealistic or overambitious and rooted in a denial of the disability. When being presented with what to expect in the job market, either directly or through their own observations, the children were presented with a group-specific category of jobs. These were the fields that you may be able to pursue as a person with visual impairment. The focus was on the impairment and what that would allow them to do, rather than on any individual basis of potential, talent or inclination.

These restrictions overflowed into future social prospects of marriage, where they were also taught to curb their expectations because of their disability. This was especially pertinent to the girls, not necessarily in terms of finding someone who would love them and marry them, but that there would be great social resistance to such an occurrence. While the system that had placed them at BAL is coaxing them to defy their disability and prove themselves to society, it was concurrently guiding them into pigeon-holed options due to what was socially perceived as appropriate for their inabilities and inadequacies.

Belonging to a Group/Identifying with the Disability

Many of the issues and themes that have been analysed and discussed thus far influence the children's sense of belonging to a group and identifying with their disability. This did not only emanate from their need to associate or identify with a group, but was also affected by external factors such as the perceptions imposed upon them by the school administration and staff, their segregation within an enclosed environment away from their homes, their parents' views and involvement and the discriminatory attitudes that they faced in the outside community. With time, the children found strength and understanding in their person with visual impairment and thus commenced to feel they belonged to this social group.

Their sense of belonging to this group was also linked to the school itself, as was observed in their growing attachment to remaining in the school on weekends and returning there after graduating. Belonging to this group was thus, to some extent, one facet of the third strategy proposed by Goffman for managing stigma: withdrawal. All of the children perceived themselves as different enough to warrant them living at BAL. They felt that they belonged at BAL as disabled and different children who were 'all the same here' *(Kamal)* and because of their fear of being in a regular school. Children who had attended a regular school before coming to BAL described their school only as having not been 'for blind children' *(Munira, Kinan, Adel – children with low vision)* or as one where 'there were all types of people … but I was the only one who was blind' *(Maroun)*. Being in a special school such as BAL actually provided the students with a space where their impairment almost became invisible.

> Abed (alumnus): At (BAL), you don't feel like your lacking/missing something.

They also feared being outside of BAL because they simply would not fit in, and they would lose whatever status they had gained within the BAL community.

> Riyad: ‘But it would be difficult to go to a regular school, because of the atmosphere there and my friends being here. It has nothing to do with the actual classes or studies, I just wouldn’t want to leave (BAL).’
>
> Abed (alumnus): ‘What can a blind child play (in the neighbourhood)? He will always be segregated/excluded, will always be clinging to his family and parents, he won’t play with the kids in the neighbourhood. I remember when I was young I used to hold onto my mother’s dress and follow her everywhere.’
>
> ‘I can’t explain why it would be harder at an inclusive school … you know, you’ll always trip on a step, or someone might trip you…’

Thus, their reservations were not only that they would not fit in the outside world but that they would also be subjects of abuse and that the community would not understand them or know how to deal with them. Their fear of being segregated or excluded from their neighbourhood led them to a segregated setting at BAL.

This sense of being ‘out of place’ extended to their homes as well. The children became acutely aware of their sense of difference in comparison to their siblings who continued to live at home. The parents continuously stated how pleased they were with BAL and how the staff had helped them with different issues regarding their children’s upbringing. These were all statements that were made in front of the children, who slowly internalised the important role that the school was playing.

> Ayman’s mother:
> It wasn’t easy for me to send him. But Ayman was having a tough time at home, he wasn’t accepting his predicament. He was always angry or nervous. It all changed when he went to (BAL), he calmed down considerably.
>
> Riyad’s father: We are really happy about the school in general, we haven’t had any trouble ever since we sent Riyad there.
>
> Ahmad’s father: It’s different at (BAL) than if they were going to school here. You can see the difference, they’re disciplined to be polite, their social interactions are different (better).

The mutual affection between children and parents was clearly expressed, but the estrangement related more to a faint understanding of what the children did and how they were dealing with their impairment. Moreover, the parents’ non-challenging and dependent relationship on the BAL administration bestowed more power to the latter regarding decisions concerning the children, and the children were aware of this. Though the children struggled to create links between their school and homes, these efforts eventually petered out as the gap between their two lives became wider and as their sense of belonging at BAL grew.

> Ruba: At the beginning, I wanted to go home all the time. Towards the end, I didn’t want to leave (BAL) any more.
>
> Abed: When I was younger, I didn’t used to want to go home.

The school administration and educational staff also contributed to drawing out the contours of this group. As discussed earlier, the school administration had adopted an exclusive ethos in which it viewed the students as a homogeneous group due to their shared impairment. This applied to the educational approaches and the control of the social space. It had created this enclosed space that was detached from the surrounding environment, and had acted in a specialised, expert role that distanced the parents from their children's daily lives for reasons of expertise and economics. These children were living different experiences from their siblings and family, which was only partly due to their impairment and partly due to their residence and attendance at BAL.

All things considered, the students understood that their best option was to be at BAL. As students in this enclosed setting, they also coveted the opportunity to obtain the high grades that would allow them to be integrated into a regular school at high school level. However, it emerged from the interviews with present and past students of BAL that this was not a comfortable move for them, but was probably desired because it was a sign of achievement that earned high praise from the school administration and naturally the parents.

> Ruba (alumnus): In the last few years, I was integrated in the high school in Kfarchima … Us blind students would also always stay together. The others couldn't really mingle with us.
>
> Omar (alumnus): Making friends at the regular school didn't come naturally to everyone … Some of the (blind students) stayed alone at the regular school.
>
> Ghina (currently integrated in a regular high school): It was just hard at the beginning, for a week or so, but then I got used to. They're all very helpful at the school. But some of my friends are still finding it hard to be there.
>
> Not just being in a new school, it's very different than here (at BAL). Here you're among people like you who are also blind, and it's much different being around students who can also see…

This first foray into the outside world confirmed to the students that they were extremely different from the others and that they belonged at BAL. The special treatment that they received, whether negative in terms of minimal socialising or positive in terms of examinations being sent to BAL in order to be printed in Braille for the student to execute in the afternoon with little supervision and no time limit, was an additional line distinguishing and separating the students from their peers who were not visually impaired. This was one additional factor contributing to the students identifying with their own social group, one in which they shared similar experiences due to their visual impairment.

As mentioned earlier, one alumnus likened his time at BAL to that of being in prison for a period of time, in the sense of being cut off from the outside world and belonging totally to the institution. The lasting effects of this sense of not belonging anywhere else other than BAL was observed in alumni who returned to the school, either to work or to continue studying.

> Field Notes:
> Another one (girl in the over 20-year-old classroom) has been through the whole educational process somewhere else, but found it hard to step out into the 'world' and has come here to take classes in English, computer and handicrafts.
>
> Omar (alumnus): The handicrafts workshop has generally been for … people who graduate and live far away (and don't want to go back to their villages).

A number of the staff with visual impairment at BAL were alumni of the school. Aside from a few who were teachers, others returned to live there and took on miscellaneous tasks as support staff. Notwithstanding their own experiences, their presence at the school with the full knowledge that they were alumni presented another indication to the children that they all belonged to this same group that was not connected through an educational experience, but through their impairment.

Conclusions

This chapter has looked into the impact of inclusive and exclusive practices on the children's social identities by exploring themes such as participation, normalisation, play, role modelling, belonging and self-perceptions. The argument is that children with disabilities learning in segregated residential institutions are being socialised into disabled identities.

The findings show that the students at BAL have identified themselves with a group of their peers who share their impairment. This has been amplified by their presence in a segregated setting in two distinct ways. On the one hand, this setting has protected them from the social stereotyping and discriminatory behaviour of their home neighbourhoods and from what appears to them as the lack of understanding and qualification of their families; they do not, after all, come from families who share their experience in terms of their impairment. On the other hand, within this enclosed setting, the children were subjected to an administrative system and perceptions and attitudes of the staff that treated the students as a homogeneous group. Moreover, these experts were assisting them in dealing with their disability and yet were predominantly negative in their evaluation of the students' capabilities due to their impairment. The older students, the returning alumni and the staff and teachers with visual impairment were their only available role models, and their experiences were not empowering. There was no challenging case for change due to their own conformity to the existing social attitudes, and the reaffirmation that this segregated institution is where they belong.

The children had been socialised into a spoiled identity, one that had become so because of its deviance from what would be considered 'normal'. The stigma that they carried was illustrated in the strategies that they adopted to manage it, in their quest for normalisation, for passing as normal and for covering their disability, which they felt was considered the most pertinent part of their identity to other people they interacted with. The aim of these management strategies was to be socially accepted.

The loss or diminishment of their sight was also associated with a sense of inferiority and inadequacy to perform, be industrious or to obtain a productive place in society's economy. This was, after all, considered the optimal path towards social acceptance and reintegration. Yet throughout this process, they were being guided into professions that have been traditionally socially accepted for persons with visual impairment, continuing their categorisation and assignment to this disabled group, as their only future means for economic gain. They were taught that they would always be inferior to others who pursued other fields of work, or had a wider choice of doing so, and that their abilities would always be insufficient to engage in other professions. The basis for this was not their own capacities or potential, but the social obstacles that they would face.

Throughout these experiences, the children encountered social discrimination in their home communities, expressed a sense of progressive estrangement from their home environment and were subject to a specialised institutional system that perceived them as a homogeneous group. In the process, a solidarity grew out of these shared concerns and developed into a sense of belonging to this social group. This group passively took on the traditional roles of persons with visual impairment, such as expecting charity, taking on occupations traditionally assigned to visually impaired persons, relating to those in their surrounding environment through musical performance and merely retreating from games or settings that required sight. The group is defined by its disability, by its deviation from standard mould, not by any other traits of its individual members. The students internalised this and were being socialised into this disabled identity, and not into an identity of an individual person with a disability.

To quote Weeks, 'identity is about belonging, about what you have in common with some other people and what differentiates you from others. At its most basic, it gives you a sense of personal location, the stable core to your individuality' (Weeks cited in Shakespeare, 1996). Social constructionism plays a prominent role where inputs from all social actors in the children's social life portray them as spoiled or deficient. These attitudes are reflected in decisions that are made about their lives, such as sending them to a segregated special school, in social interactions of avoidance or derision in their home community and in the control and sympathy that they are subjected to at their special school. Wherein all of these social interactions treat them as commonly disabled, as different from those in their family and social circles, the children find their personal individuality within a group of their disabled peers.

The analysis here has shown that children with disabilities attending institutions were managing stigmas and were being socialised into disabled identities. In addition to the findings drawn from the data at the institution, the links between institutionalisation and spoiled identities were further emphasised as such stigmatised identities were not evident or manifested in any of the children with visual impairment who were included in regular education, indicating that different social values were being attached to their impairment, and it is these values that have been the primary influences on the children's identity formation.

This situation has not been aided by the recent disability legislation and policy. Though these are based on rights-based perspectives, the content of the law continues to interpret this within segregated notions of equality. That is, the rights violations towards persons with disabilities that existed in Lebanese policy are being rectified by creating separate parallels for persons with disabilities. These parallels consist of measures that have adopted a social model approach by adapting disabling barriers and creating allowances in health, education, employment, housing, recreation and transport, but as parallels, they do not make it a requirement that any of the mainstream service provision become inclusive for all. Whereas the law subscribed to the thrust of the social model to bring persons with disabilities into society, it only managed to create a concentric circle for them on its fringe. This reflects the perception of disability as a general misfortune which policy-makers have responded to by broadening the outreach of governmental services (Donoghue, 2003).

In other words, the content of the law reverts to prevailing understandings of persons with disabilities and their support. Those who capitalise on the potential opportunities within the law's delineation of rights in specific realms, and challenge the segregation of its implementation, do so individually, mirroring a medical model outlook that places the burden of 'fitting in' on the persons with disabilities. Therefore, the content of the law did not challenge socially constructed views of disability or stereotypes of incapacity. Additionally, the content of the law did not include mechanisms to support its implementation, within ministries and governmental decision-making processes, and has thus had little influence on adapting or changing the system of service provision or practice.

Overall, the children could best relate to their families and communities by attempting to 'normalise' their actions and achievements. This only served to confirm their disability and their difference from 'the norm'. This dichotomy of their experiences inside and outside BAL reinforced their belonging to a similarly disabled peer group and perceiving that group as existing mainly at BAL. The school had created an isolated subculture of 'the blind' that the students clung to more and more as they grew older. It was the place or group where they felt that they belonged because it was where they felt they were accepted, in a group that shared their experience of difference and discrimination. Their experience of physical segregation has led to self-initiated social segregation. The findings demonstrate how these many factors were internalised in the children's self-perception and identity formation.

In conclusion, these empirical findings have contributed to understanding and knowledge of disability legislation, policy and practice in a number of ways. They have shown that rights-based legislation cannot impose inclusive changes in policy and practice without mechanisms and incentives in place for implementation. In the absence of such change, practices remain predominantly exclusionary, with no effective mechanisms for the meaningful participation of parents or children, eventually socialising the children into disabled identities. In order to change provision and practice, a full implementation programme has to be in place with participation of stakeholders, activists and professionals in partnership. Without this, the gap between the rhetoric of the legislation and policy and the provision and practice will only be bridged with difficulty and very slowly as is the case in Lebanon.

The findings have shown that children 8–12 years of age were not exhibiting any noticeable resistance to the systems of control and had adopted the discriminatory values relating to disability exhibited around them. This may change later on in their lives although the data does not extend to any possible changes in their later years. Some of the interviewed alumni expressed some resistance to these values later in life, while others did not and continued to return to the institution as visitors or friends. This would indicate that it is of particular importance for young children that there are formal mechanisms in place for them to express their views.

The analysis of power and control and social oppression has drawn on Foucauldian ideas of power, control and surveillance and Goffman's concepts of stigma and total institution in an analysis of a Lebanese institution for visually impaired children. Goffman's concepts of stigma and total institution were explored through the organisational ethnography and provided insights into the social construction of identity and exclusionary and inclusionary practices in relation to the use of space, the mechanisms for the children's representation and participation within the institution and the ways in which stigma and social acceptance operated both amongst the staff and the children. The lack of participation and agency of these children was clarified at both the institutional level and within the wider society.

Within a total institution, the individual's identity is restructured and redefined. For children, this started with their removal from their family and home setting. They were then oriented to actions that were considered appropriate by administration and staff at the institution. Within these interactions with the staff, the children began to form a specific outlook on their disability and their self-identity. This was reflected in the levels of ascribed status, where children recognised an assigned lower status for higher levels of visual impairment. It was seen in the 'phantom normalcy' that the educational system promoted and was later exhibited by the children themselves. The task facing the children was not only of compliance, but conformity, which emphasised their physical deviance from a norm and which led to their self-perception of stigma that they attempted to manage to mask their difference.

The cumulative effect of these actions and systems led the children to be socialised into disabled identities. Work needs to be done to mainstream disability so that it is not viewed as deviance or a source of stigma. This can be initiated by deinstitutionalising children with disabilities and modifying social services and systems to make measures of control and surveillance reciprocal and share responsibility and decision-making with parents and children. Such actions would create a different web of power relations that does not oppress parents and children and allows for greater room to manoeuvre to express agency and resistance, which would ensure a constant dynamic of adjustment and change.

The concepts of power and stigma have been extended through their application to this setting, particularly in illustrating their combined influence on self-identities and marginalisation. This study at macro and micro levels has extended understanding of the processes of change between policy and practice in the field of disability. This can be used in further research on other disabilities, as well as in comparative studies between countries in the region. Such a study can also be used to inform future social action.

In terms of the study of the social construction of children's identities, this study has illustrated the multivariate elements in social interactions, organisations and legal systems that contribute to the social construction of identities. Young children are making meaning of their lives by observing and experimenting within these realms, and the resultant responses impinge on their self-perceptions and their understanding of the social world and their place in it. This study has shown that, from a child's perspective, discriminatory attitudes manifest themselves in various ways through their daily life, reaffirming what is considered socially acceptable behaviour and roles, eventually socialising them into disabled identities.

In other words, rather than standing in the face of this social injustice, the children are being taught how to play their role within this dominant status quo.

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Chapter 51
Leadership for Social Justice Throughout Fifteen Years of Intervention in a Disadvantaged and Multicultural Canadian Urban Area: *The Supporting Montréal Schools Program*

Jean Archambault and Chantale Richer

For years, school boards in Montréal, Québec, Canada, have fought for additional resources from Québec's ministry of education, given that Québec's poverty is concentrated in the city of Montréal. The province of Québec has a long tradition of equalling resources to every student be they living in urban centers, in rural areas or in difficult-to-reach parts of the province. Nevertheless, for Montréal's school boards, equalling resources was not enough. Montréal's poorer students showed greater school difficulties, had less school attendance, more dropouts and as a whole succeeded less in school than their more advantaged counterparts. For Montréal's school boards, this was considered as injustice even in the face of equal resources.

In 1997, Québec's ministry of education responded positively to Montréal school boards' demands. Taking advantage of the educational reform to be put in place, the ministry introduced Supporting Montréal's schools as a line of action of this reform. With its innovative governance structure based on collaboration and with a professional team exerting educational leadership for the schools, the Supporting Montréal Schools Program, implemented for elementary schools, began fighting against injustice to every student in order to improve every student's learning. Since the beginning, fighting for injustice to improve learning was the goal. With the years this goal became more and more explicit, and teaching and learning along with fighting against prejudices and false beliefs as well as opposing deficit thinking and readiness took their place. This was attained mainly by producing and using data from a series of research studies on leadership for social justice.

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The Supporting Montréal Schools Program has been in place for nearly 15 years. In this chapter we describe this programme in the context of Canada's and Québec's education systems and Montréal's urban area and show how it evolved in fighting injustice in disadvantaged areas with leadership for social justice by school principals.

Education in Canada, Québec and Montréal

Canada is a British-style constitutional monarchy, a confederation of ten provinces and three territories. One province has French as its official language (Québec); eight provinces and the three territories have English as its official language, and one province has both English and French. Québec, the focus of this chapter, is the second largest province with 24 % of Canada's population. Throughout Canada, education is a provincial responsibility and each province has the exclusive right to make its own laws to organize its education system (Gouvernement du Québec, 2006).

As for the quality of education, Canada enjoys a favourable reputation around the world and many countries envy its education system (Dubet, 2010). Analyzing data from the Program for International Student Achievement, the Organization for Economic Cooperation and Development shows that Canadian students are amongst the highest performing students of its member countries not only in science but also in mathematics and written comprehension (Organisation pour la Coopération et le Développement Économique [OCDE], 2011[1]). Duru-Bellat (2009) presents data where Canada is considered one of the richest countries, where schooling has a 17-year expectation compared to only a 2-year schooling expectation in least developed countries. Moreover, amongst the richest nations, Canada's education system is considered as "low" in creating social inequities of performance (Duru-Bellat, Mons, & Suchaut, 2004). However, poverty still exists and persists in Canada's urban areas (Levin, 2004, 2009).

Québec's Particular Situation

Québec is the French province of Canada. About 83 % of the 7.5 million people speak French, whereas 18 % speak English or other languages. This particular linguistic situation has political and social impacts given that Québec is surrounded by about 330 million people who speak English. Because the official language is French, all political and governmental institutions function in French. For more than 40 years, some political parties have worked to give Québec its political independence as a way of protecting its French heritage and language. For now, Québec is recognized by federal and provincial governments as a distinct nation and the French people as one of the two founding peoples of Canada.

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[1] As French is the official language in Québec, the part of Canada where this study took place, we often used the French versions of publications. But publications like this one are also available in English.

Under the Charter of the French Language, instruction in Québec "…is to be given in French at the preschool, elementary and secondary levels. However, some students who meet specific requirements of the Charter may receive their schooling in English. These students account for approximately 11.2 per cent of the total enrolment in Québec's elementary and secondary schools" (Gouvernement du Québec, 2006, p. 3). For instance, students whose parents are Canadian citizens who have been educated in English in Canada may be given instruction in English in school.

Québec's Education System

In Québec, instruction at the elementary and secondary levels is free, public or private whether in French or English. Québec's education system is under the governance of a ministry of education, le ministère de l'Éducation, du Loisir et du Sport (MELS), that decides orientations and gives directions to the whole system (Gouvernement du Québec, 2006). The system is then divided into a public sector (more than 90 % of the students at the elementary level and around 70 % of the students at the secondary level) and a private sector with French or English schools' funded at 60 % by the ministère de l'Éducation, du Loisir et du Sport.

This particular situation, i.e. a large public sector mandated to serve every student in Québec and a private sector abundantly funded by the government, is a source of tensions and of social injustices in Québec's education system. Private schools are highly selective. Students in these schools are selected on the basis of good behaviour and high academic performance. If a problem arises, students may be sent back to the public sector which is compelled to serve students with whatever "difficulties". Students with difficulties or whose parents cannot afford private schools' fees are clearly not eligible to the private sector. Furthermore, the business sector helps maintain this selectivity of the private sector by publishing each year a "palmares", an honours' list of the best performing schools in Québec. Private schools are always amongst the first on the list. And even if some public schools do well in this comparison, it is clear that the worst schools are in the public sector. This reinforces rich and educated parents' choice for the best schools in the private sector and drains the "best" students from the public sector to the private sector. Clearly the poor and the "difficult" students have no place in the private sector schools. In fact, no private school, by any measure, is considered a poor or a disadvantaged school.

The public sector has two linguistic school board networks, one for children from the Francophone majority and another for children from the Anglophone minority who meet the linguistic requirements of the Charter of the French Language. These networks overlap so that each one covers the entire territory of the province of Québec so as to ensure that instruction in French or in English be given wherever it is needed.

There are 60 Francophone school boards and 9 Anglophone school boards across Québec's territory that are mandated for organizing educational services in their regions. The vast majority of the population of Québec (more than 80 %)

is concentrated along the Saint-Laurence river in the southern sections of Québec. Therefore, school boards vary greatly from small ones with very few students (less than a thousand) covering a very large geographic territory to large ones with many students (as many as 100,000 students in the largest school board in Montréal) covering a very small geographic territory.

The ministry of education does not work directly with the schools. Instead, in addition to financing the school boards and giving orientations and directions, it supports the school boards in labeling the educational services. School boards are financed on an equality basis. That is, every student is afforded equal financing. Additional financing is allocated for special services (for handicapped students or students with adaptation or learning difficulties) and to take into account extra transportation of students due to distance. Special allocation is also provided to schools located in disadvantaged areas.

School boards are responsible for ensuring access to elementary (6 years) and secondary (5 years) schools to every student in Québec. Here, students are expected to complete at least secondary education, and in 2007, 91 % of the students were awarded a secondary education diploma (Gouvernement du Québec, 2008).

Poverty and Immigration in Montréal

With a population of nearly two million, the Island of Montréal is Canada's second largest city and the largest city of Québec, the French province of Canada. In Quebec, poverty is highly concentrated in the Montréal urban area. Nearly 30 % of its families use 20 % more income than the general mean of the population for food, lodging and clothes and are thereby considered with low income (Low income cut-offs for 2008 is 21,359CDN$). Two-thirds of Montrealers have an income that is under the mean of 34,300CDN$ (Statistique Canada, 2010). And this is not to imply that those residents earning the mean income are considered well off.

This economic situation has to be put into another context, that is, the high immigration rate in Québec. Montréal, as a large urban area, is the main entry for immigrants into Québec, and it has welcomed the vast majority of the more than 40,000 immigrants each year. Most of these immigrants settle in Montréal. This immigration is diverse and varied: people come from around the world. This diversity of immigration is evident in our school system: the biggest of the five school boards in Montréal is serving 70,000 children and has children from 188 different countries with about 150 different mother tongues. One out of four of these children was born outside Québec (Commission scolaire de Montréal, 2010).

Poverty is also evident in our educational system. Montréal's five school boards' schools serve about 21 % of all Québec's children, but they account for 82 % of the 10th decile on poverty in Quebec and for 62 % of the 9th decile. The majority of Montréal's elementary schools (56 %) are from low socio-economic status neighbourhoods. These 184 public schools serve about 57,000 students and benefit resources from the government (Gouvernement du Québec, 2009).

Socio-economic inequities abound in Montréal, as middle-class and rich neighbourhoods border with much poorer areas. While poverty is often highly concentrated in schools and poor and rich children are not mixed, sometimes children from these different neighbourhoods go to the same school. For many years, the French and English school boards have fought to obtain additional resources from the governments. Education being a provincial jurisdiction, Quebec's government acknowledged particular needs for Montréal urban area and provided for additional resources. In fact, it is this particular situation of Montréal that led to the creation of the Supporting Montréal Schools Program in 1997 as part of Quebec's educational reform (Gouvernement du Québec, 1997). This programme (SMSP) is responsible for providing support to 184 low SES elementary schools from three French and two English school boards of Montréal. This chapter takes a close look at this educational programme to promote equity.

The Supporting Montréal Schools Program

Before describing the key components of the programme, we will present its origins. Afterwards, we will take a look at its evolution and at its evaluation.

The Origins of the Supporting Montréal Schools Program

In 1996, the Conseil Supérieur de l'Éducation du Québec (CSE), the advisory council for the ministry of education, analyzed Montréal's particular situation and described two major characteristics of Montréal schools: the concentration of poor children and of multiethnic groups. For the CSE, the principal difference between Montréal schools and other schools in the rest of Québec resides in the concentration of these characteristics and their effects of accumulation and mutual reinforcement.

Thus, the CSE realized how it was important to do something special for Montréal schools, in particular for disadvantaged neighbourhoods. In fact, in CSE's (1996) notice, we can read that Montréal public schools have problems with student achievement and that these problems represent an educational, economical, social and cultural stake, not just for the island of Montréal but for all the schools of the province of Québec.

These observations had been long made by Montréal's school boards themselves who had had no rest in asking for additional resources from the ministry of education. They were well aware that these problems meant social injustice for Montréal's students.

In 1997, in the context of the educational reform in Québec, the Ministère de l'Éducation du Québec put forward seven action lines for the elementary and the secondary schools of Québec (Gouvernement du Québec, 1997). One of these action lines took into account Montréal's particular characteristics and was aimed at supporting Montréal schools in order to reduce the inequality of achievement described by the CSE (1996). By this time, some funds were already allocated to schools in disadvantaged areas and some interventions were already present in those schools, but the Ministère de l'Éducation du Québec considered them insufficient. This is why it created the Supporting Montréal Schools Program (SMSP) that was different from previous interventions particularly in its mode of governance based on educational leadership and in its emphasis on empowering the schools and school principals. SMSP's objective was thus " to promote the personal and educational success of students from disadvantaged neighborhoods while taking into account their needs and resources, and contributing to the creation of an engaged education community" (Gouvernement du Québec, 2009, p. 8), and its orientations were to facilitate students' schooling experience that take into account their characteristics and their needs, to facilitate schools' openness to its community and, lastly, to facilitate schools' autonomy and responsibility (Gouvernement du Québec).

This acknowledgement by the Government of Québec and the additional resources granted to these schools were based on the intention of increasing Montréal students' performances. In this sense it was a first official step in considering social injustices in the schools and the decision to help in the fight against social injustices.

So the first implicit definition given to social justice in the SMSP was one where fighting injustices and having equal learning opportunities available to the poor were salient. In fact, the raison d'être of the Supporting Montréal Schools Program was to render more probable the equal opportunities of children living in poverty. This definition stems from Quebec's government's intention to allow Montréal schools in disadvantaged areas additional resources. Over the years, these steps would become more explicit, larger and more usable within an intervention framework.

Key Components of the SMS Program

Structurally, the Supporting Montréal Schools Program comprises a coordination committee, 184 targeted elementary schools (the most disadvantaged schools of the Island of Montréal), service to about 57,000 of the 101,000 students, seven measures or strategies to be implemented by the schools, a professional team in service to the schools and additional funding of 12,2 million CDN$. Let us describe these components, beginning with a vision component: educational leadership and empowerment.

Educational Leadership and Empowerment

Educational Leadership and empowerment were core aspects of the vision underlying interventions of the SMS Program. Leadership would be exerted mainly by school principals, but teachers engaged in professional development would be encouraged to take leadership in their areas of expertise while principals were also encouraged to empower them to do so. Empowerment meant giving power to people so that they could take charge and responsibility of their professional behaviour. Leadership was defined as the influence exerted so as to guide improvement in a school (Leithwood, 2005; Yukl, Gordon, & Taber, 2002). The word educational was used first to mark a sharp contrast with a managerial perspective and to think of school as a community instead as an organization or an institution (Sergiovani, 2005; Shields, 2009) and second to keep opened to the whole area of education and, as it, to be less restrictive than other forms of leadership like instructional leadership (Hallinger & Murphy, 1985) or learning centered leadership (Knapp, Copland, Honig, Plecki, & Portin, 2010; Murphy, Elliot, Goldring', & Porter, 2006).

Even though social injustice for the poor was acknowledged since the beginning of the programme and interventions to open access and opportunities to the students were already in place, the concept of leadership for social justice became apparent with the establishment, in 2005, of a collaborative research programme between our research team at the Université de Montréal and members of SMS Program's professional team and school principals. At first, we were interested in school principals' job in disadvantaged areas, and soon it became clear that leadership for social justice would become a main research issue in studying principals' job. In fact, the very reason why the SMS Program was put in place (inequities for the poor) became a main issue in our collaborative research, issue on which we could now put new words: leadership for social justice.

In order to better understand the concept, we reviewed the literature on leadership for social justice (Archambault & Harnois, 2009a) and isolated definitions and concepts that could be helpful in research about principals' jobs and in professional development (Archambault & Harnois, 2010b). Our working definition was inspired by Ayers, Quinn and Stovall (2009) for whom social justice education rests on three principles:

> 1) *Equity*, the principle of fairness, equal access to the most challenging and nourishing educational experiences, the demand that what the most privileged and enlightened are able to provide their children must be the standard for what is made available to all children… 2) *Activism*, the principle of agency, full participation, preparing youngsters to see and understand and, when necessary, to change all that is before them… 3) *Social literacy*, the principle of relevance, resisting the flattening effects of materialism and consumerism and … nourishing awareness of our own identities and our connection with others,.. (p. xiv)

We have found these principles very useful in helping principals and teachers grasp the full reality of social justice. But the interventions and our research data bore mainly on prejudices and false beliefs (e.g. deficit thinking) against poverty and poor people because it was part of the SMS Program to fight those prejudices and false beliefs and because this was the easiest thing to see in the schools. Nevertheless, these principles guided action in that equity was promoted instead of merely equality, activism instead of awareness alone and self-awareness to help understand one's privileges and change one's behaviour.

As we will see later, our attention was also drawn to transformative leadership (Shields, 2010), a theory that helped us understand the work of typical school principals. We will later take a closer look at the research programme on leadership for social justice. For now, let's turn to another of SMS Program's component.

The Coordination Committee

The intention at the beginning was that schools should be mobilized and empowered to take charge of their own destiny and that the responsibility of the Ministère de l'Éducation du Québec was to provide the frameworks, the means and the scope for decisions. This is why the Supporting Montréal Schools Program was managed by a coordination committee composed of the vice deputy minister, the director of the Direction générale de Montréal (MEQ) and the director general of the five school boards involved (Gouvernement du Québec, 2009). It was the first time that officers from the school boards and from the Ministère de l'Éducation, du Loisir et du Sport,[2] were collaborating to manage a programme like this. This joint management was and is an important leadership orientation aimed at empowering the schools themselves.

The coordination committee's tasks were to define the SMSP's objective, orientations and the collective services offered to the schools, to distribute financial resources and to ensure SMSP's evaluation (Gouvernement du Québec, 2009).

The Seven Measures (Strategies)

In the plan presented to the schools, seven measures to be implemented by the schools were put forward. These measures are "…recognized as having a potentially significant impact on the progress, learning and motivation of disadvantaged students" (Gouvernement du Québec, 2009, p. 39). School teams are responsible for the implementation of these measures, which is coordinated by the school principal and supported by the SMSP's professional team.

It is interesting to note that these measures are in fact cues for the schools but that schools remain responsible for choosing the means they will use to implement the measures while taking into account their particular contexts. This orientation shows again the importance attributed to the local school and, as we will see later, to the school principal as leader of the changes brought by the implementation of the measures.

The seven measures are defined as follows:

1. Instructional interventions that promote learning and success for all
2. Development of reading competency
3. The guidance-oriented approach
4. Professional development of school administrators and the school team
5. Access to cultural resources
6. Cooperative links with students' families
7. Cooperative links with the community

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[2] In 2004, following a change in government, the ministère de l'Éducation du Québec became the ministère de l'Éducation, du Loisir et du Sport.

Measure 1: Instructional Interventions that Promote Learning and Success for All

For a school team, this involves acknowledging that every child from disadvantaged areas is able to learn and then establishing conditions that will ensure that the child is actually learning. For the team, these conditions include having an open attitude towards all students and their families, maintaining high expectations for these students, gaining knowledge and understanding of the neighbourhood in which they work, keeping knowledge up to date on best practices for learning and, for school principals, creating administrative practices that center on learning for all.

During the 15 years of the programme, this measure was the one that has changed the most in relationship to social justice. At the beginning, this measure was centered on interventions to adapt teaching and referred exclusively to students with handicaps or with learning or behaviour problems. Then it was broadened to encompass support to students at risk and was centered on adaptive interventions. This conception of "students at risk" was later abandoned because it referred only to students' difficulties and did not question the school's responsibility. It rather implied that students are primarily responsible for their being at risk. For example, it was heard in schools that students lack maturity and knowledge, are under-stimulated at home and have difficulties in learning. In spite of educators' good will, the description of the measure reinforced deficit thinking against students from poverty (Archambault, 2010; Garcia & Guerra, 2004).

The following description was "Actions that promote learning for all", *all* meaning every student without exception. This description was not aimed at labeling students as was the case with "students at risk". This change in description was seen as an important social justice change to begin fighting prejudices and deficit thinking against students from poverty and to help schools gain a new representation of students and act according to this representation.

Measure 2: Development of Reading Competency

At the beginning, this measure emphasized that each school team has to ensure that emergent reading and writing are introduced at the preschool level and that the necessary conditions for optimal progression of reading competency at the elementary level are put in place. Later, the view of the reading competency expanded and it became important that every student is immersed in a culture of reading and writing and have access to diverse, rich and complex reading experiences. This difference is important because the idea of a culture of reading and writing exceeds learning letters, syllables and sentences. Rather, it refers to the world of reading and writing so as students experience the meaning of writing, its function and this to what it gives access to human beings. The SMSP offers many training sessions to teachers to ensure that they demonstrate a broad interest in various contexts and experiences to bring to the children.

Measure 3: The Guidance-Oriented Approach

The meaning of this strategy is to have school teams introduce steps that help students assume responsibility for their own educational paths by learning to know themselves and by developing self-efficacy beliefs, by knowing about the labour world, by recognizing their aptitudes and interests with regard to vocational choices and by developing a vision of their own future. The ultimate goal of this strategy is to promote students' active social participation in order to counter social exclusion so often linked with poverty.

Measure 4: Professional Development of School Administrators and the School Team

School principals and school teams must recognize their need for ongoing professional development particularly in disadvantaged areas and its impact on student learning and must also have opportunities for ongoing professional development. SMSP's training sessions aim at a deeper knowledge of the conditions and effects of poverty and its influences on learning in order to develop a better understanding of interventions in disadvantaged areas. Through the years, as SMSP's professional team gained knowledge and understanding of social justice, the concept of social justice (equity, activism and social awareness) was gradually introduced in the professional development activities for principals and their school team, mainly in the sense of acknowledging their own prejudices and false beliefs particularly their own deficit thinking, and taking steps to eradicate these prejudices and false beliefs.

Measure 5: Access to Cultural Resources

For someone living in poverty, it is difficult to use family money to go to a theatre or to visit a museum. Moreover, cultural resources are virtually absent from disadvantaged neighbourhoods. In fact, with very few exceptions, cultural resources like public libraries, book stores, performing arts or theatre companies, science clubs, music, dance or painting schools, movie theatres and so on usually settle in more advantaged neighbourhoods. As a result, children in disadvantaged areas have practically no access to cultural resources, another kind of social injustice that merits fighting against. Thus, the goal of this strategy is to have school teams and students be brought to and visit cultural venues and events in Montréal (wherever they are located) during school hours to instill students with a taste for the arts and sciences and to promote visits to cultural organizations. The goal of this strategy is also to enrich education by creating links between classroom teaching, cultural objects and people involved in the arts and sciences. This enrichment is easily available to students from middle and upper class in their families and neighbourhoods, whereas it has to be initiated and promoted in part by the schools with students in disadvantaged areas (Rothstein, 2004).

The whole community of more than 60 Montréal cultural partners like cultural centers, theatres, museums and scientific centers work collaboratively with schools to elaborate educational cultural projects for the students. In those projects, students were not only consumers of artistic culture but also were taught how to produce cultural works.

Measure 6: Cooperative Links with Students' Families

This is intended to bring families and schools closer together. This strategy involves school teams facilitating closer ties between school agents and family members and promoting parental involvement in children's educational success. Communication strategies, facilitation of parents' role and knowledge of community's resources were to be developed by schools. In particular, school personnel had to work at knowing their students' and their families' ways of life, their relationship with the school and how they apprehend the language of instruction, authority, knowledge, etc. This is what González, Moll, and Amanti (2005) refer to as funds of knowledge. There are people working in schools with children of poverty who do not know how these children live and how they function socially and therefore cannot appreciate the difference that can occur between school's expectations and these children's lives. This is not to say that these children all live in the same way. Rather, this measure was intended to initiate reflection on these differences, whatever they are, and to develop knowledge of children's realities, whatever they be, in order to bring families and schools closer.

As a complement to this measure, an interpreter service has been created for the schools in order to allow better communication with immigrant families who do not speak French (remember that French is the language of instruction in Québec and immigrant children are greeted in French schools) and better integration of the families to school life, avoiding by the same way exclusion of the families from an important part of their children's life.

Measure 7: Cooperative Links with the Community

School teams must ensure that participants from the school along with the family and other community partners (community, social, cultural, institutional or economic organizations) work together to implement the necessary conditions for students' overall development.

This measure, intended to create links between the school and its community in order to better respond to students' needs, has greatly developed during the last decade. School teams along with community partners have worked together to ensure that the necessary conditions to students' global development are in place. This common goal for all partners was the orientation given to the collaboration between partners, putting together every expertise in order to support students and their families.

SMSP's Professional Team

The professional team is composed of either French or English education professionals from the five Montréal school boards and is chosen according to their expertise in intervention in disadvantaged areas. This French and English formal collaboration was a premiere for the Ministère de l'Éducation du Québec. These professionals were responsible for supporting the schools in the implementation of the seven measures while taking into account a needs assessment performed by each school for its milieu. Bringing together different beliefs and different school board cultures from different with linguistic disparities was made possible because each professional adhered to SMSP's philosophy. SMSP was thus seen as the point of intersection for these differences.

School teams, principals, teachers, pedagogical trainers or counselors, pre-K personnel and special education, psychology or speech professionals could all receive support from the professional team. For example, they could receive support:

To understand a single measure or the programme in its entirety
To know about poverty and about its impact on learning
To implement professional development networks

The professional team was also contributing and engaging in development projects with the schools and their community partners and in collaborative research with universities. Many of these projects resulted in the development of tools for the schools (brochures, frameworks for intervention or for innovative projects, short films, guides, films, questionnaires, lists and descriptions of innovative projects, etc.) and of intervention models in order to support measures implementation by the schools.

Finally, the professional team has conceived and developed several training opportunities for the schools. These training sessions were continually infused by research results on effective and relevant interventions. During the years, about 50 of these training sessions were given to the schools mostly extending from 1 to 10 days during the school year in order to ensure depth of reflection and follow-up of action. All of the 184 school principals and more than 900 teachers and 100 other professionals participated in those sessions every year.

SMSP's expert professional team worked with schools and their partners for 15 years in order to empower schools and help them change their way of seeing poverty and learning in poverty, help them change their practices and help them take charge of their interventions and create their own way of making school so that every child from poverty feels he or she has a place in the school.

Allotment of Financial Resources

SMSP also provided additional funding of 12, 2 million CDN$ from the Ministère de l'Éducation du Québec to help Montréal's schools in disadvantaged areas. Eighty-five percent of this money was transferred directly to the schools and 12 %

went indirectly to the schools by the implementation of collective services to answer their needs.

Moneys were allocated to schools according to their area's poverty level and to the number of students in each school so as the most disadvantaged schools would have even more funding than less disadvantaged schools. This funding plan aimed for the equity of resources for schools with greater needs and greater challenges with their families living in greater poverty. Nevertheless, every target school had opportunities for additional funding to help implement SMSP's seven measures.

Evolution and Evaluation of the Supporting Montréal Schools Program

As soon as the second year of life of the SMSP, an evaluation plan was put in place in order to assess its functioning and to evaluate its results. Twenty one university studies were conducted on different aspects of the SMSP: implementation of the programme or of a particular measure, relevance, efficiency, effects, functioning or regulation. Generally speaking, SMSP's evaluation judgment took into account its contribution to students' success by accessing to quality instructional services and adequate learning environments.

One example of the contribution of these studies to the advancement of the SMSP is the one on leading a school in disadvantaged areas with a particular emphasis on social justice (Archambault & Harnois, 2008). The first part of this study was a literature review commissioned by the SMSP in order to evaluate if the measures were still relevant, 10 years later. It strongly supported the finding that making learning a priority, instructional innovation and co-responsibility and principals being leaders for learning and leaders for social justice were amongst the most important leadership characteristics of high-performing schools in disadvantaged areas. But the study led to other interesting findings on school principals' job in disadvantaged areas, particularly concerning social justice, such that it became a research programme in collaboration with the SMSP. We will now turn to this specific research programme.

Research on Leadership for Social Justice

One of the Supporting Montréal Schools Program's mandates is that research be produced on its different aspects. For our purpose here, the research that is relevant is the one linked to measure 4 of the SMSP, *continuous professional development of the school principal and the school team*.

Over the years, our research team at the Université de Montréal has established a collaborative research programme with members of SMSP's professional team and school principals. SMSP's professional team was responsible for offering professional development activities to the elementary school principals working in the targeted schools. We were interested in school principals' job in disadvantaged areas. SMSP's professional team wanted to make sure that what they would offer principals would be related to their professional needs. So upon collaborative reflection, we asked questions about these principals' job: what is the job of a school principal in a disadvantaged area? Is it different from leading a school in a more advantaged area? If so, what is different and what do these principals need for professional development?

We began by searching the literature on principalship in disadvantaged areas, and at first we found only normative papers or opinion papers, but no research papers (Haberman, 1999). So we turned to research on school effectiveness and school improvement in disadvantaged areas. We found in this literature converging results that were useful for our own research (Archambault, Ouellet, & Harnois, 2006). Then we became aware of a set of research initiated by Leithwood, Jacobson, Chapman and their colleagues where they studied successful school principals (Leithwood, 2005), improvement of schools facing difficult or challenging circumstances (Chapman & Harris, 2004) and successful school leadership in challenging or high-poverty schools (Jacobson, Brooks, Giles, Johnson, & Ylimaki, 2007). While these studies repeatedly supported Leithwood and Riehl's (2005) initial findings that four core practices were present in effective leaders even in the most challenging contexts (1 – setting directions, 2 – developing people, 3 – redesigning the organization and 4 – managing the instructional programme), they did not inform us on typical principals' leadership practices nor how principals develop those practices to become effective. And in our research with the SMSP, we work with typical principals, not many of them being effective as transformational leaders if we look at Leithwood's criteria.

Furthermore, given that the main reason the SMS Program exists is to fill the gap between Montréal's disadvantaged students and their more advantaged counterparts, our thinking came to include social justice issues. But we found that this literature did not really take into account social justice. With a little help, this way of studying leadership could have taken into account the issues of social justice in the organization, but it still did not question issues of power and inequities nor did it intend to modify the organization in order to ensure equity. In fact, the latter is better taken into account by transformative leadership theory. For Shields (2010), transformative leadership first implies critical reflection on the part of the leader in order to analyze and understand his reality, then "… action to redress wrongs and to ensure that all members of the organization are provided with as level a playing field as possible—not only with respect to access, but also with regard to academic, social, and civic outcomes" (Shields, p. 572). The emphasis here is on a particular way of looking at things and on the action that will change things to resolve a problem of inequity but that will also organize a learning context so as to provide equity of opportunity and to prevent inequities to happen. In our work with SMSP, we advocate this way of seeing things and embrace transformative leadership theory given the orientations and actions of the SMSP. In fact, transformative leadership theory seems more relevant to SMSP's interventions with school principals.

For research, it became our framework to operationalize leadership for social justice, one of the more important ways to fight inequities for poor Montréal's students.

Nevertheless, although Shields (2003, 2010) has presented us with conceptual thinking about transformative leadership, not much empirical work has been done on the subject, the less being on typical school principals. Shields (2010) and Theoaris (2010) have worked with what we may call outstanding school principals who had already made large changes in their schools, but again research with typical school principals (the majority of school principals) in the process of professional development is badly missing.

Our Evolving Research Program

One of the major goals of our research programme is to know better what is the job of a typical school principal with regard to transformative leadership for social justice (research team) in order to offer principals relevant professional development activities (SMSP's professional team). We have now conducted three studies on the subject and three others are on their way (Archambault & Garon, 2011a, b; Archambault, Garon, & Harnois, 2010; Archambault & Harnois, 2010a). But before describing these studies, let us consider a statement we made about social justice, statement that came out of a literature review on the subject (Archambault & Harnois, 2010b) and that will help us to explore the reality of the schools:

> Social justice in education rests upon these principles 1) equity,…; 2) activism, …, and 3) social literacy, … (Ayers et al., 2009). Equity in systems and in political, economic and social structures with particular respect to the exercise of power, wealth and resources sharing and to the acknowledgement of diversity on all forms leads to social justice. Moral values like equality, justice, democracy, equity and respect and the full and complete participation of every one contribute to this ideal of justice. Instances of absence of social justice leads to questioning supposedly neutral and objective political, economic and social systems and structures reproducing the dominant culture which has been imparted power and resources to the detriment of other peoples. (p. 3)

This statement became our working definition of social justice, and we use it as a basis for our interviewing and observing school principals and in data analysis.

In our first study, we interviewed 45 typical elementary school principals in eight focus groups that met twice. At the first meeting, we asked them to talk largely about their jobs. At the second meeting, we presented principals with the main findings of a review of the literature on performing schools in disadvantaged areas (Archambault & Harnois, 2006) in order to further stimulate responses from them.

We found that school principals saw leading a school in disadvantaged area as having to exert a transformative leadership that advocates social justice. This finding is consistent with the abundant literature on leadership for social justice (Archambault & Harnois, 2009a) and on transformative leadership (Shields, 2003, 2006). Nevertheless, this subject was not discussed by school principals at the first meeting. At the second meeting, we presented leadership for social justice as being one of the main features of performing schools in disadvantaged areas (Archambault & Harnois, 2006) and questioned principals about false beliefs and prejudice that are present in disadvantaged areas (Archambault & Harnois, 2009b; Gorski, 2008; Normore & Blanco, 2006). At first they told us that there were no prejudices or false beliefs in their schools: their personnel had been working in the school for many years and knew the neighbourhood and its characteristics. Upon further questioning, they acknowledged that there were prejudices, false beliefs, deficit thinking and lowering of expectations in their schools. This first and subsequent follow-up questioning process is very important.

Then, principals described their role as being one of fighting against these prejudices and false beliefs in order to protect social justice. Yet, during the two meetings, principals also exhibited their own prejudices and false beliefs very similar, on the whole, to those of their school teams. One could hypothesize that it is our questioning that sensitized them to their school team's prejudices and that, since nobody can be against virtue, it became morally just for them to speak up against those prejudices and to claim they were fighting against prejudices. Furthermore, given that they themselves showed these kinds of false beliefs and prejudices, one could ask if their level of awareness towards prejudices and false beliefs was really that high and if they would have thought of fighting against false beliefs and prejudices without our questioning during the interviews. If so, then it would confirm the role of leadership research for social justice. In any case, the principals described strategies they used to protect social justice in their schools. Some principals reported being extremely active in promoting social justice.

Nevertheless, these findings were astonishing given that the reason for the very existence of the SMS Program was to fight inequities and injustices directed to the poor. So we then wanted to know more about what principals were doing to address these issues. We wanted to further examine how school principals not only fought prejudices or false beliefs but also, more broadly, how they exerted transformative leadership in order to pursue social justice in their schools (Shields, 2010; Theoaris, 2010).

To answer this question, we collected actual behaviour data by observing 12 typical elementary school principals for 3 days during which they were followed by a research assistant who recorded everything they did.

We found that very few observation data were related to social justice; that was and is an interesting finding—though not surprising. Indeed, given the fact that in the first study, principals had to be questioned directly on the subject to even talk about it was anticipating the evidentiary findings. Maybe this was because principals understand only superficially the issues of the dominant culture, of poverty and, more broadly, of social justice. Furthermore, many behaviours could not be categorized as social justice behaviours [or not], because principals' intentions were rarely explicit. And lastly, maybe observing principals for 3 days is not long enough to see all the instances of advocating for social justice. Occasions like principals' speeches at the beginning of the year or a particular principal's interventions happening only once during school year (versus prejudices apparent in the school's personnel room, prejudices against some parents or some ethnic minorities, etc.)

may be not amenable to observation during our short time frame. Thus, it became evident that we had to design a more elaborate framework for studying transformative behaviours and to choose a methodology that would allow us to have access to the motivations and intentions underlying what principals do and when to supplement the many situations that are missed by on-site observations.

With respect to transformative leadership, we agree with and take into account the advice of scholars who claim that transformative leadership for social justice is not only a matter of believing or talking about social justice but more importantly a matter of *doing* something to promote social justice (Beachum & McCray, 2010; Bogotch, 2002; Shields, 2003, 2010; Theoaris, 2010). Compared to outstanding principals who turn their schools around using transformative leadership, our typical school principals' work does not seem to be influenced by social justice. Yet, when they are shown social injustices, they acknowledge them verbally. But clearly, talking about it is not enough.

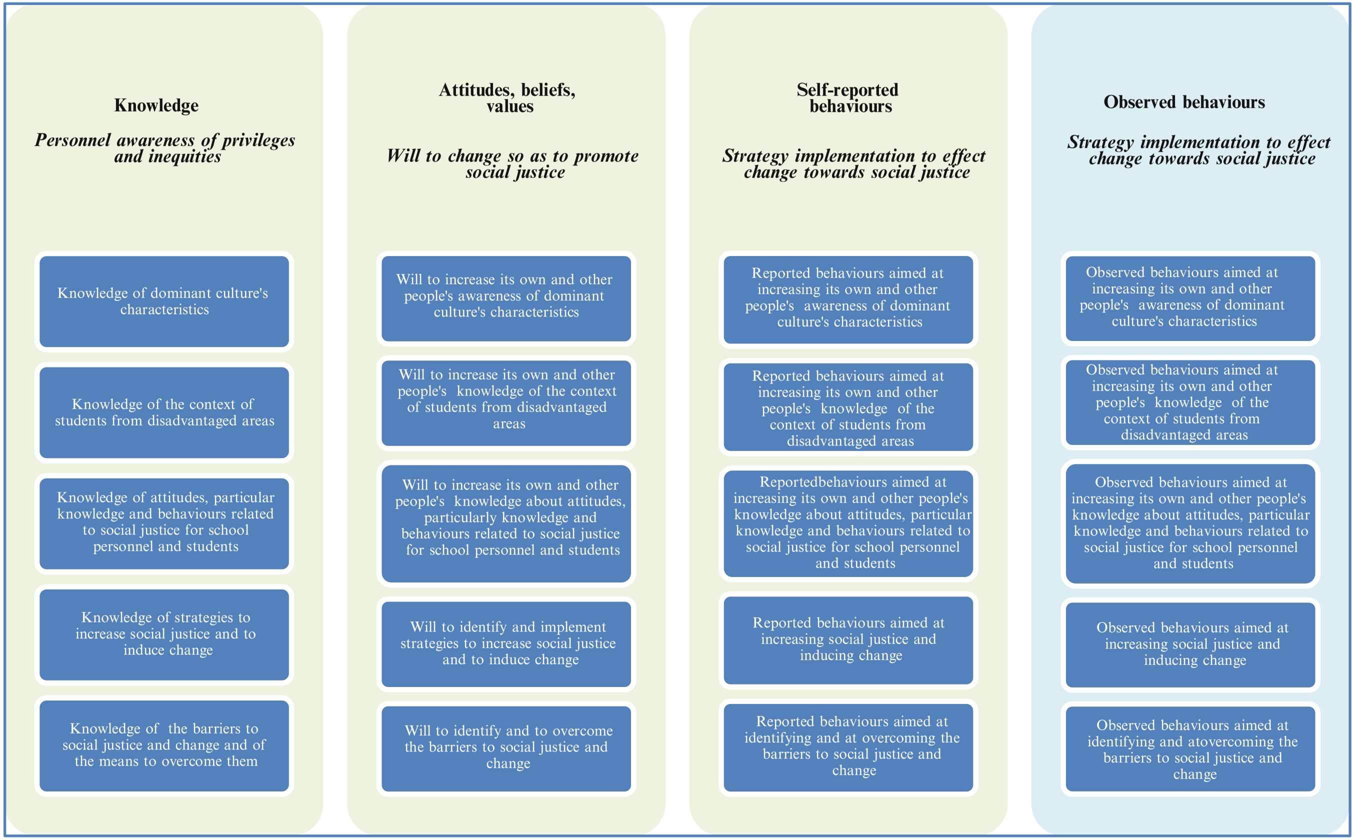
So we then looked at the literature on behavioural change (Eccles, Grimshaw, Walker, Johnston, & Pitts, 2005; Fishbein, 2000; Hagger, Chatzisarantis, & Biddle, 2002) and we integrated it with aspects that have to be taken into account by transformative leaders in order to effect changes in their schools (Shields, 2010; Theoaris, 2009).

We arrived at a new framework containing four core elements of behavioural change: 1 – knowledge, 2 – attitudes-values-beliefs, 3 – reported behaviour and 4 – actual behaviour and skills which focused on five aspects for transformative leadership:

1. Elements of the dominant culture
2. Context of students from disadvantaged environment
3. Personnel's and students' knowledge, attitudes and behaviours linked to social justice
4. Strategies to promote change and social justice
5. Barriers to the promotion of change and social justice and means to overcome them

Each column of Fig. 51.1 represents one of the four elements of behaviour change, whereas each line represents an element to be taken into account by transformative leaders. These elements combine with aspects of behaviour change to show every part of the framework that should constitute the discourse or the behaviour of transformative leaders—or both.

In future research, our work as researchers is clearly to better understand school principals' work. We plan to develop and refine our conceptual framework and to pinpoint the strengths and weaknesses of both data collection methods—interview and observation. As for professional practice, our work is also to help principals be aware of the importance of power imbalance in their schools and to act to improve it. The framework we presented here, to be used to study transformative leadership practices for social justice, can be useful in school principals' preparation. Our initial preparation programmes and professional development programmes for school principals should take social justice into account. We will gain a better idea



Knowledge ***Personnel awareness of privileges and inequities***	**Attitudes, beliefs, values** ***Will to change so as to promote social justice***	**Self-reported behaviours** ***Strategy implementation to effect change towards social justice***	**Observed behaviours** ***Strategy implementation to effect change towards social justice***
Knowledge of dominant culture's characteristics	Will to increase its own and other people's awareness of dominant culture's characteristics	Reported behaviours aimed at increasing its own and other people's awareness of dominant culture's characteristics	Observed behaviours aimed at increasing its own and other people's awareness of dominant culture's characteristics
Knowledge of the context of students from disadvantaged areas	Will to increase its own and other people's knowledge of the context of students from disadvantaged areas	Reported behaviours aimed at increasing its own and other people's knowledge of the context of students from disadvantaged areas	Observed behaviours aimed at increasing its own and other people's knowledge of the context of students from disadvantaged areas
Knowledge of attitudes, particular knowledge and behaviours related to social justice for school personnel and students	Will to increase its own and other people's knowledge about attitudes, particularly knowledge and behaviours related to social justice for school personnel and students	Reportedbehaviours aimed at increasing its own and other people's knowledge about attitudes, particular knowledge and behaviours related to social justice for school personnel and students	Observed behaviours aimed at increasing its own and other people's knowledge about attitudes, particular knowledge and behaviours related to social justice for school personnel and students
Knowledge of strategies to increase social justice and to induce change	Will to identify and implement strategies to increase social justice and to induce change	Reported behaviours aimed at increasing social justice and inducing change	Observed behaviours aimed at increasing social justice and inducing change
Knowledge of the barriers to social justice and change and of the means to overcome them	Will to identify and to overcome the barriers to social justice and change	Reported behaviours aimed at identifying and at overcoming the barriers to social justice and change	Observed behaviours aimed at identifying and atovercoming the barriers to social justice and change

Fig. 51.1 Operational framework for the study of transformative leadership (Archambault & Garon, 2011a, 2011b)

of Québec school principals' needs for training (SMSP's goal). Should training be concerned with their knowledge, their attitudes or their behaviour? Which of the five elements that distinguish transformative leaders from typical principals should be addressed first? Answering these questions empirically should help faculties to renew their curricula and staff to improve their services so as to better suit school principals' needs for professional development and practice in disadvantaged schools. Indeed, we can educate principals better if we take elements of the framework into account. First, professional development should consider the many aspects of behaviour change: principals' knowledge, attitudes, beliefs and values, as well as their reported behaviour and, primarily, their actual behaviour. Knowing better where they stand on each of these aspects will allow us to focus on the most salient points during professional development. Secondly, these aspects of behaviour change should be worked upon in order for principals to increase their awareness of the aspects of social justice they will have to look after in their schools: the elements of the dominant culture and the exercise of power; the context of students from disadvantaged environment; personnel's and students' knowledge, attitudes and behaviours linked to social justice; strategies to promote change and social justice; and barriers and resistances to the promotion of change and social justice, and the means to overcome them. By taking into account each element of this framework when preparing school principals, one could contribute to better development of principals to embrace a transformative leadership role for social justice.

Conclusion

Supporting Montréal Schools Program was created 15 years ago by Québec's ministry of education because of the acknowledgement that schools in poverty were highly concentrated in Montréal. This poverty concentration was aligned with less students' success at school, more learning and behaviour difficulties and greater dropout rates.

For years before, Montréal's school board's demands were that they be allowed more resources to fight what was considered as a major inequity despite the equal share of resources in Québec schools. Additional resources would be used to close the gap between poor children and more advantaged ones in the schools. SMS Program was these additional resources and its mandate was to help schools put in place seven measures that would help reduce this gap.

Since its inception in 1997, SMSP's interventions were oriented towards social justice. At the very beginning the concept of social justice was not used, but with our review of the literature and our research findings shared with the SMS Program's community, it became clear that what was the programme working on was indeed social justice. In fact, research with school principals was and still is intended at knowing better their job, but it became quickly evident that their job had to do with them exerting leadership for social justice. Bringing precision to one of the measures of the SMS Program (measure 4 – professional development of school administrators and the school team), it also served at operationalizing this part of intervention to promote social justice: principals' leadership. Accordingly, interventions to support schools and reflections on these interventions were reshaped with a social justice orientation, and in turn these new interventions helped shape a more complete view of social justice.

Changes in labeling of the measures and in their implementation in the schools are but one example of SMSP's improvement instilled by our findings: widening the concept of learning and applying it to more students in order to avoid exclusion, doing the same with reading and writing in order to open access to a larger number of productive learning situations, helping students take charge of their own educational path, giving students more and more access to cultural resources, creating and maintaining links with parents and the community and, last but not least, using research to better understand school principals job in fighting for social justice in their school in order to offer them professional development situations that help them improve. Needless to say that these changes in labeling were accompanied by a change in SMSP's professional team intervention emphasis. In fact, it is these changes in understanding and emphasis in interventions from the professionals that brought the labeling changes.

Our research on leading a school for social justice has also brought about other changes in the programme. The literature reviews we produced have been rewritten in professional language and distributed to school principals working with SMSP or outside. Our findings, in particular the necessity of an ongoing professional development bearing on poverty (and its impact on learning), social justice and social inequalities (Duru-Bellat, 2009), have been integrated in the professional development sessions offered to teachers, principals and other school personnel (in the last years, 27 % of the 184 schools had poverty as a professional development content, while very few had it 12 years ago). New professional development networks for school principals have been given birth with emphasis on increasing awareness of prejudices and false beliefs, of social injustice and exclusion situations and on interventions to fight them. Furthermore, it became evident that school principals should also benefit from this new emphasis on social justice. This is why a course on leading a school in disadvantaged areas has been created and given to future and in-service principals in Montréal and throughout Québec.

Many conditions have rendered possible this evolution throughout 15 years of intervention. The particularly collaborative way of governance of the SMSP, its confidence in the capacity of the schools to implement the measures and to improve and its orientation towards schools taking charge, the capital role given to school principals as a leader who supports implementation and improvement, the engagement and collaboration of the professional team and its research-oriented decision making and, above all, its clear orientations towards learning and social justice for all.

School principals are pivotal to the implementation of SMS Program's measures in their school. As so they are responsible for changing their school in order to close the poverty gap, for fighting injustice and for promoting equity and justice. Our research programme is instrumental in delineating principals' behaviours related to social justice. As so it helps gaining knowledge of and informing professional development for what should be considered as one of the main intervention of the Supporting Montréal School Program: principals' leadership for social justice.

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Chapter 52

Research for Social Justice in Contexts of Student and Family Homelessness

Peter M. Miller

Dorothy Day once claimed that “Our problems stem from our acceptance of this filthy, rotten system” (Gioseffi, 1988, p. 103). Her succinct assessment is noteworthy in that she attributes society’s wide-ranging challenges to a flawed *system*—one that actively undermines countless people’s chances to thrive—and she implies that we are culpable for its existence. She attaches our collective agency to her problem identification; we can either acknowledge and work to change the system—a system of social injustice—or we can continue to tolerate it. My views of social justice are largely informed by Day’s. I believe that conditions of justice are furthered by cultures and structures that afford all people fair opportunities to enjoy society’s benefits. I think these cultures and structures are animated by ethical action and that this action must be particularly responsive to those whose opportunities to thrive are most fragile. Given the historical pervasiveness of injustice in our society and the ongoing dominance of established power structures, such action must unfold consistently and across a multitude of spaces and methods. Educational researchers clearly have a role in this work.

Finding Niches in Social Justice Research

Efforts to learn about and promote social justice in education research unfold at different levels of abstraction and with diverse conceptual, theoretical, and methodological foci. In this chapter, I describe how my work is situated within these larger areas.

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Levels of Abstraction

Social justice research is conducted at several different levels of abstraction in the field of education. Perhaps most common among the empirical work are micro- and macrolevel studies. Microlevel work focuses on issues of justice "at the ground level"—that is, as they are situated in particular schools, neighborhoods, and organizations. I have conducted a number of microlevel case studies of schools, neighborhoods, and community-based organizations. For example, one of my papers (Miller, 2008) examined the ways that leaders attempted to recognize and respond to community residents' voices in the context of an emergent university-school-community partnership. What such work often lacks in external validity, or the extent to which its findings can be generalized to other settings, it often makes up for its rich, descriptive nature. It can reveal the everyday subtleties and complexities that shape social and educational opportunities within bounded spaces.

Other social justice works take on more macrolevel foci. More so than microlevel work, they examine "big picture" trends, issues, and ideas. A noteworthy example of macrolevel scholarship is Berliner's (2006) widely disseminated article entitled "Our Impoverished View of Educational Reform," which delineates an array of national and international trends in economics, health, and education in order to highlight conditions of social injustice. Some macrolevel work takes on a more policy-specific focus, including my (Miller, 2011a, 2011b) examination of the federal McKinney-Vento Homeless Assistance Act. Such efforts provide key insights to leaders and policy makers who engage issues of social justice at multiple levels and keep them abreast of the larger contexts in which local and regional action develops.

Along with micro- and macrolevel matters (which clearly intersect), I am especially interested in learning about *meso*-level issues of justice. That is, I examine the ways that key social and educational organizations work together and attempt to understand how their boundary-crossing capacities facilitate and/or inhibit social justice. Such meso-level analyses are consistent with the conceptual, theoretical, and methodological orientations of my work.

Conceptual Foci

Many scholars' social justice work is tethered to particular conceptual areas. That is, rather than talking about social justice in the abstract, it is examined in light of a particular issue, policy, event, or occurrence. Amid a panopoly of overarching social justice "issues"—such as race, class, and gender—I focus most closely upon issues of student and family homelessness in the USA.[1] I want to learn about homeless students' and families' education experiences—and how they are associated with the ways that communities develop collaborative and/or integrated structures to serve them. I view the context of student and family homelessness as being an increasingly relevant social justice issue in the USA for three reasons: (1) students who experience homelessness occupy the far end of the continuum of social and educational risk, (2) more schools and communities are facing significant challenges relating to homelessness than in recent years, and (3) there is a lack of "differentiated" knowledge about how to best address homelessness in school settings.

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[1] While I am interested in examining issues relating to schooling and homelessness other countries as well, my time and resources have not been sufficient to begin this work yet.

Homeless Students on the Continuum of Risk

Homelessness has been shown to have wide-ranging deleterious effects upon parents and children alike, but amidst these diverse situations—whether related to financial duress, domestic violence, substance abuse, etc.—children are almost always among the most innocent and vulnerable of victims. Wong et al. (2009) explained:

> The reality that vulnerable children and youth are among the homeless debunks the public generalization that homeless people do not take personal responsibility for their actions—that they choose to be homeless. The homeless population in fact includes children and youth whom a complex set of circumstances beyond their control—and often understanding—has rendered without a home. Homelessness for this group is traumatic, hurtful, and often terrifying. (p. 56)

This trauma, hurt, and terror—which I witness just about every time I visit a shelter—accompany students to school. It is not surprising, then, that homelessness is associated with an array of negative school outcomes such as low attendance rates (Maza & Hall, 1990; Rafferty, Shinn, & Weitzman 2004; Rubin & Erikson, 1996), poor grades and achievement scores (Cauce, 2000; Masten et al., 1997; Rafferty, Shinn, & Weitzman, 2004), and social stigmatization (DeForge et al., 2001). Findings from the National Center on Homeless Education's ([NCHE] 2010) annual report, for example, indicate that homeless students in school districts that receive federal McKinney-Vento Homeless Assistance Act funding throughout the USA score quite low on academic achievement tests. While these numbers are not significantly lower than those of students who are poor but housed, they represent only a sliver of homeless students' school-related challenges. My comprehensive review of the research on schooling in contexts of homelessness (Miller, 2011a), for instance, found that homeless students appear more prone to social isolation and school mobility than just about any other segment of the wider student population—relegating them to positions of extreme risk for academic failure.

Increasing Prevalence of Homelessness

A second reason that student homelessness is an important social justice issue to address is that it has increased at a startling rate in recent years. NCHE noted that nearly a million students were identified as homeless in US schools in 2010—an 18 % increase since 2007. In fact, during that same period of time, 42 of 50 states

Table 52.1 States with increases of at least 20 % in students identified as homeless between 2007–2008 and 2010–2011 school years (NCHE, 2011)

Alabama	Alaska	Arizona	Arkansas
Hawaii	Idaho	Illinois	Kansas
Maryland	Minnesota	Nebraska	New Hampshire
Oklahoma	Pennsylvania	South Carolina	Wyoming

noted increases in the number of students identified as homeless, and 16 have witnessed increases of over 20 % (refer to Table 52.1). Within these states, increases have been seen in urban, suburban, and rural school districts, indicating that homelessness is not just an "urban" issue, but one that touches most communities. As we seek more socially just school and community systems of practice, then, matters related to homelessness are to be increasingly centered in education research agendas.

Understanding Diverse Conditions and Practices

Finally, in addition to the fact that homelessness is associated with widespread school problems and that more and more students are experiencing homelessness throughout the country, its pertinence to social justice education research agendas is heightened given the relative paucity of empirical understandings we have about the diversity of homeless students' residential contexts and the types of practice that can best engage them. The major aims of my research agenda include the parsing out of such matters.

A first step in this parsing out is to move the field beyond categorizations of the homeless as a monolithic group of chronically mobile and/or dysfunctional individuals. Widely disseminated works by Bahr (1973), Bahr and Caplow (1973), and Rossi (1989), for example, were noteworthy in conceptualizing homelessness as a "condition" witnessed among swaths of highly troubled and often self-destructive individuals. Presented as a population consisting largely of socially detached single men residing in distressed urban corridors, such conceptualizations of homelessness concurrently fueled and jived with common public perceptions of the homeless. Such perspectives were perhaps crystallized in Ronald Reagan's 1983 framing of homelessness as a "lifestyle choice" (Foscarinis & McCarthy, 2000). In recent years, however, more nuanced attempts have been made to move beyond such portrayals of the homeless as monolithic assemblies of dysfunctional individuals. Significantly, a number of studies in the 1990s examined and/or produced different typologies of homeless people. Kuhn and Culhane (1998) suggested that the most noteworthy of these typologies include (1) Grigsby and colleagues' (1990) model that clustered the homeless into the "recently dislocated," the "vulnerable," the "outsiders," and the "prolonged"; (2) Mowbray et al.'s (1993) model that identified the "hostile/psychotic," the "depressed," the "best functioning," and the "substance abusing";

and (3) Humphreys and Rosenheck's (1995) model that clustered the homeless as "alcoholic," "psychiatrically impaired," "best functioning," and "multi-problem." These typologies recognize key differences among the homeless but move only a bit beyond earlier homogenizing conceptualizations, in that, like the previous work, they focus almost exclusively on individual characteristics.

Kuhn and Culhane (1998), building upon the work of several others (Fischer & Breakey, 1986; Hopper, 1989; Jahiel, 1992; Koegel, 1987; Lovell, Barrow, & Struening, 1984; Morse, 1986; Rossi, 1989; Snow & Anderson, 1987; Sosin et al., 1990), attempted to account for more diverse factors related to homelessness by testing a model breaking homeless case profiles into three patterns: the transitionally homeless, the episodically homeless, and the *chronically* homeless. The authors refer to the *transitionally* homeless as those who are forced to enter shelter systems for short periods of time—and usually just once—due to some traumatic life event. Those who fit this category are least likely among the wider homeless population to have significantly destructive and/or debilitating personal characteristics. The *episodically* homeless are described as those who "shuttle in and out of homelessness" (Kuhn & Culhane, p. 211) and are more likely to experience mental/physical health and abuse problems. Finally, the *chronically* homeless are characterized as people who are "entrenched in the shelter system, and for whom shelters are more like long-term housing than an emergency arrangement" (p. 211).

Testing this typology of homelessness in New York and Philadelphia, Kuhn and Culhane found that 80 % of the homeless population was composed of young, transitionally homeless individuals who were less likely to have physical/mental health or abuse problems than those from episodic and chronic homeless groups.

While such research that tests and/or puts forth various typologies of homelessness appears to have utility in debunking deficit-oriented depictions of the homeless as a unitary group—instead focusing on incidences and durations of homelessness, it has limitations in that, to date, it has focused mostly upon *adult* individuals who are staying in *shelters or on the street*. There is, in fact, a dearth of work that has taken differentiated approaches to learning about *family* homelessness in different types of shelters as well as in conditions of shared housing. Findings from such work could be vital to the development of responsive school practice.

In concert with this continued examination of diverse family and youth contexts of homelessness, I consider how schools—and the key actors within them—can best respond. While there is an abundance of articles that describe or examine the roles of school counselors, social workers, and teachers (refer to Table 52.2), we know far too little about how these roles intersect within school contexts and, just as importantly, how they intersect with outside-of-school organizations as they attempt to serve homeless students' needs. Further, there is a striking shortage of scholarly work that addresses school administrators' work around issues of homelessness. As such, I have studied the collective work of school and community leaders serving homeless students and families—an agenda that I continue to pursue in my current line of inquiry.

Accordingly, given well-documented school struggles of students who experience homelessness, the elevated nature of the crisis in recent years, and the lack of

Table 52.2 Selected peer-reviewed articles addressing key school roles in contexts of homelessness

Role	Article	Focus
School counselors	Baggerly and Borkowski (2004)	Social service delivery
	Daniels (1992)	Awareness of student conditions Central actions in meeting student needs
	Stormont-Spurgin and De Reus (1995)	Counseling and social service delivery
	Strawser et al. (2000)	Student engagement and policy implementation
	Wall (1996)	Social service delivery and program coordination
	Walsh and Buckley (1994)	Counseling, classroom guidance, consultation, and coordination
School social workers	Freeman (1994)	Service delivery
	Hernandez Jozefowicz-Simbeni and Israel (2006)	Policy implementation
	Markward (1994)	Policy implementation
	Moroz and Segal (1990)	Service delivery and policy implementation
	Timberlake and Sabatino (1994)	Child advocacy and service delivery
Teachers	Calabrese-Barton (1998)	Science education pedagogy
	Klein et al. (1993)	Early childhood education
	Shields and Warke (2010)	Connecting schools and families
	Swick (1996)	Engaging students and families
	Swick (1999)	Empowering families using ecological awareness
	Swick (2004)	Early childhood education
	Yamaguchi and Stawser (1997)	Student instruction and advocacy

nuanced understanding of homeless students' conditions and/or needs, work that examines homeless students' experiences—and the systems that serve and/or inhibit them—has a clear place in the wider body of social justice research in education.

Theoretical Foci

Theory shapes the ways we examine, analyze, and discuss particular issues of social justice. Critical theory is particularly relevant and visible in the wider body of social justice-oriented education research. Critical Race Theory, feminist theory, and critical pedagogy, for example, reveal and critique structures that undermine justice. While some of my work has drawn from elements of Paulo Freire's critical pedagogy and, in turn, is related to other specific critical perspectives in highlighting some "dirty, rotten" aspects of the education system, my studies of homelessness in contexts of education have most frequently been guided and informed by distributed leadership theory and social capital theory.

Jim Spillane's work on leadership as a distributed practice has structured the ways I consider leadership in contexts of student and family homelessness. Spillane (2006) depicts leadership as a practice that unfolds in the interactions among leaders, followers, and their situations over time—a perspective that provides appropriate insights for my meso-level inquiry because it focuses on more than simply the attributes and/or actions of those in formal organizational leadership positions. Rather, it emphasizes the central relevance of other actors and *the situations* in which practice occurs. Leadership is depicted here as a multilayered relational practice that is notably shaped by specific school—and, in the case of my research on homelessness, community—contexts. Spillane explains the fundamental relevance of the situation from the distributed perspective:

> The situation is not simply a context within which school leaders practice; it is a defining element of practice. The situation – tools and routines of various sorts – shapes leadership from the inside out rather from the outside in…In this view, *the situation does not simply affect what school leaders do*; *in interaction with leaders and followers*, *the situation defines leadership practice* (p. 22).

Importantly, the distributed perspective calls for understandings about how aspects of the situation enable and constrain leadership practice "and thereby contribute to defining it" (p. 19).

Learning about leadership in homeless education contexts from a distributed perspective necessitates deep understandings of key school actors and the organizational structures in which they operate but also understandings of the homeless families themselves. The distributed perspective centers the relevance of both micro- and macrolevel data in describing the situation. For example, Nunez and Fox's (1999) "snapshot of family homelessness" was useful in providing broad insights into the scope and scale of homelessness around the United States. The authors substantiated previous indications that there is great variance in homeless populations both within and between cities. (For instance, they found that although only 68 % of homeless adults across the country had high school degrees, homeless adults in Atlanta, GA, and Salem, OR, graduated at rates of 77 and 75 %, respectively.) Because the backgrounds, experiences, and perceptions of parents and other key stakeholders are important elements of the homeless education situations in these cities, such findings could have significant implications for the ways educational leaders engage homelessness in their schools. In fact, from a distributed perspective, these backgrounds, experiences, and perceptions—which are quite similar to "the situations" in which I have examined leadership in contexts of homelessness—actually shape leadership practice.

In addition to distributed leadership theory, much of my inquiry has been informed by social capital theory. Specifically, I have drawn from the work of James Coleman, Pierre Bourdieu, Mario Small, and, especially, Nan Lin to examine families' and organizations' ties that shape homeless students' school-related experiences. Given the fundamental role of Lin's work in shaping my inquiry, I describe how several of his constructs are particularly useful for the study of student and family homelessness.

Lin (1999) defines social capital as "resources embedded in a social structure which are accessed and/or mobilized in purposive actions," (p. 35) specifically identifying the three ingredients to social capital as (1) resources embedded in a social structure, (2) accessibility to such social resources by individuals, and (3) mobilization of the social resources by individuals. Lin's network theory is especially useful as an analytic lens for my work because it can help uncover the complexities of families' and students' relationships with and deployment of education-related resources in a way that can yield new insights for educational theory and practice.

Embedded resources, in this instance, are conceptualized as being situated in families, schools, shelters, and other community-based educational resources (after-school programs, early childhood intervention programs, etc.). I attempt not only to surmise *if* such resources exist but to learn about factors such as the *heterogeneity* of these resources and their *institutional attachment*. Lin (1999, 2000) claims that these matters are often noteworthy when considering individuals from non-dominant backgrounds because they tend to have social capital networks that are homogeneous (they know mostly people who are like themselves), limited in range (they do not know many "highly ranked" people), and institutionally unattached (they do not have meaningful roles or affiliations with resourceful groups/organizations). Lin (2000) describes these as issues of "social capital inequality" that restrict individuals' life opportunities. According to Lin, women, African Americans, and the poor tend to be particularly limited by such resource-poor networks. They often rely upon family and kin networks—networks that are helpful in many ways, but can also limit upward mobility because they often lack "bridges" or "structural holes" to new personal, professional, and/or educational opportunities.

Accessibility, the second of Lin's (1999) social capital ingredients, is useful as an opportunity construct. That is, embedded educational resources (that are situated in schools, shelters, etc.) must be known by and available to students and their families in order to be made relevant. If families are unaware that resources exist and/or they perceive resources and relationships to be unavailable, such resources cannot be made meaningful to them. A range of factors such as public/school policy, community context, and family conditions can affect accessibility.

The third ingredient of Lin's social capital, mobilization, refers to the actual use of these resources/relationships. That is, a family might know about a program and understand that the program is one for which they are eligible, but unless they actually use that program, they would not be mobilizing it. Figure 52.1 portrays the interrelated nature of the three central elements of Lin's (1999, 2000) theory.

Accordingly, I draw from Lin's work to analyze the broader structures and relationships that affect diversely situated children and their families as they engage schooling processes. This theory leads me to ask broad research questions such as: What is the nature and extent of education-related relationships and resources available to students and families during periods of homelessness? What factors shape these resources' accessibility to students and families? and how and to what extents and effects are accessible resources mobilized?

These social capital-informed questions have been particularly useful in my research that compares families social and educational situations if different

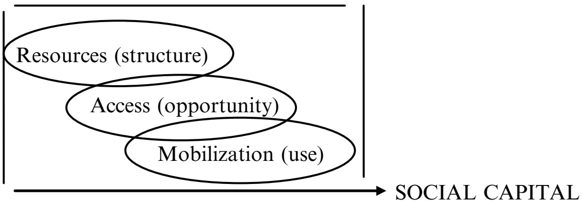

Fig. 52.1 Lin's elements of social capital

contexts of homelessness. They have allowed me, for instance, to consider how and to what extents students and families who are in "doubled-up" conditions (sharing housing with others) experience homelessness and schooling differently from those who are in shelters or other formal residential programming. I have found that, from a network perspective, doubled-up conditions—which, like sheltered ones, are often marked by stress, turmoil, and mobility—are especially concerning for several reasons. First, families' relationships in these contexts are typically geared toward serving only what Lin (1999, 2000) refers to as "expressive" ends. As opposed to "instrumental" action, which is directed toward bettering one's life conditions (i.e., better job, education, etc.), expressive action serves maintenance purposes. It seeks to keep things as they are or, at the very least, to keep them from getting any worse. Accordingly, families are unlikely to be actively seeking or, in turn, gaining educationally expanding resources or relational supports from their surroundings when they are doubled up with others for extended periods.

On a related note, a second concern is that *even if* families are seeking life improvement (and, specifically in this context, educational improvement), doubled-up settings do not appear to naturally facilitate access to "rich" relationships and resources that are heterogeneous and/or institutionally attached. Doubled-up settings provide families with few cues about how to access or mobilize educational resources (such as those afforded by the McKinney-Vento Homeless Assistance Act) and, by nature of their out-of-the-system statuses, can complicate schools' efforts to identify and serve them. This is especially relevant considering Lin's (2000) finding that women, African Americans, and those who are poor—all of whom are significantly overrepresented among the homeless—are most likely to have networks that are "resource-poor" and devoid of institutional support. They need connections to school resources and relationships and often do not receive them in doubled-up settings. Accordingly, while shelter/agency resources such as in-house tutoring programs, daycare services, and tools of practice (books, computers, supplies, etc.) are likely of utility to students and families experiencing homelessness, a social capital perspective would suggest that shelters'/agencies' greatest utilities rest in their capacities to connect the homeless to sustainable school and community resources. These utilities are not found in doubled-up settings.

While both distributed leadership theory and social capital theory have been central in framing my research on homelessness and education, there is much space in the wider field of student homelessness for more work that is rooted in—and advances—theory. Indeed, the lack of theoretically grounded work is a major gap in this area of research, for only a handful of the countless articles and reports on student homelessness are substantively guided by a particular theoretical framework or philosophical schema. Whether used in tightly deductive or more loosely guiding manners, theory has great potential for organizing and focusing inquiry and for providing a rigorous foundation upon which new learning can occur. Importantly, theory can also facilitate greater transferability of research methods and findings across places and disciplines, making prominent differences between urban, suburban, and rural settings—and education, social science, and medical/health science fields—more navigable. Theory can help us move toward collective, yet nuanced, understandings of common issues. Calabrese-Barton's (1998) work, for example, draws from feminist and liberation pedagogy theories to examine the teaching of science to students who are homeless. Although it is focused on one narrow area of practice, her research offers meaningful insights to practitioners and scholars in diverse fields because matters of oppression, voice, and empowerment—which are central to her theories of choice—are relevant to almost all who are homeless or serve the homeless.

Methodological Considerations

Finally, social justice research in education is executed with a range of methods. Qualitative research has found a central place here in that it allows researchers to vividly present participant voices and experiences. Jonathan Kozol's *Rachel and Her Children*, for example, provides a rich, moving description of homeless families' experiences in a crowded, dirty New York City high-rise and contributes a deep, historically rooted understanding of complex policy, poverty, and opportunity intersections. For such reasons, I use mostly qualitative methods when I attempt to learn about inter-organizational relationship networks in contexts of student and family homelessness. I value—and attempt to center—the multi-positioned voices that shape homeless students' chances to thrive. In this way, qualitative methods ensure that my interrogation of *structures and systems does not* obfuscate *my ultimate commitment to the particular, to individuals*, for, as eloquently stated by Dorothy Day, "It is *people* who are important, not the masses" (Day, 1952/1980).

In my examination of homeless families' education experiences in one urban region, for example, a number of mothers cited shelter-based after-school programs as major asset in their children's learning and development. They provided rich insights about how and why these programs helped their children—insights that would have been difficult to gain without narrative data. The following two excerpts provide examples:

> The after-school program here is very, very helpful. It's tremendous. Because they're *here*. When we're getting off work or coming back late from school, they're *here*. It's wonderful. I hope it never changes – even for families who come here years from now. … They have a reading program that is special. My daughter kind of liked reading in school, but she *loves* reading here – and it brought her grades up in school. It's great!

> They’ve been really, really great with my daughter. There was a time when the children were struggling with spelling words and the staff here designed a curriculum to help them with that – to incorporate their spelling words into the after-school program. I thought that was great and my daughter’s grades improved because of the extra support she received here. And the reading program where the kids can check out books is great. My daughter comes home with all kinds of books and she loves it. We read them together, she comes back and gets new ones and we do it again… It encourages children to read and go to the library…And the computer center is really great.

As noted, I have also found qualitative inquiry to be useful in shedding light on the procedural complexities of inter-organizational work that aims to benefit those who are experiencing homelessness. Interview data can address questions such as: How do productive, resource-rich relationships unfold across organization boundaries? and how do entrenched systems of policy and practice facilitate and/or inhibit collaborative action? These questions were central to my (Miller, 2009) study of inter-organizational leadership in contexts of homelessness, in which, for example, shelter workers voiced frustration with schools that they perceived to be nonresponsive to homeless students’ needs. The following quotes were representative of many others gathered from that study:

> We have children who are transferring often, who haven’t made friends in the schools, haven’t done well. Our kids have a lot of problems with other children when they go into the schools. Our mothers are fired up wanting to call people, wanting to take names, wanting to find help … but who do we call? Who do we talk to deal with it? There’s not a lot of communication when a child is failing, especially if it’s one of our children. There are all kinds of excuses …’I don’t know the mailing address. I didn’t have the phone number. This wasn’t right. That wasn’t right.’ (p. 239)

> Our schools are all used to working in compartments. And when something throws them for a loop, they fly off the lid and don’t take responsibility. But in the world of the homeless, the unusual is the norm. The school district needs to respond immediately. (p. 239)

I have found that narrative data can be further interrogated, built upon, and complemented in a range of ways. Many researchers, for example, gather observation and documental data to complement interview data and increase the trustworthiness of their work. In addition to these, I have also found geospatial and participatory methods to be useful. For instance, I used geospatial analysis to probe claims of inequitable student “opportunity zones” in one city (Miller, 2011a) and, in another study (Miller, 2011b), attempted to learn more about mothers’ claims that their transportation options were inadequate by actually riding all their local bus routes myself. Such data can move beyond confirmatory purposes, lending researchers multilayered, experiential understandings of their work.

Amid the promise of qualitative inquiry in this context, however, I should note that qualitative research in settings of family and student homelessness faces at least two significant “access” issues. First, although researchers must develop deeper understandings of how students who are doubled up can better access and mobilize educational resources, it is highly difficult to identify critical masses of these students and to study them over extended periods of time. Second, even when students who are homeless are identified and their families agree to take part in studies, it can be difficult to gain “authentic access” to their actual lives and the issues affecting them. Douglass (1996) provided an eloquent description:

> Much of the interviewing of children who are homeless has been conducted by interviewers who are unfamiliar with the children, in settings that are often overcrowded, noisy, and busy…It is critical to understand the impact that an unfamiliar interviewer or a hectic environment may have on a testing situation and on young children’s behaviors and ability to demonstrate competencies. Parents know how different most children act in an unfamiliar setting with unfamiliar adults. A usually focused or thoughtful child may become silly, non-attentive, or impulsive. (p. 745)

Douglass’ (1996) insights here are noteworthy, in that only a handful of the hundreds of articles and reports I have read in this area acknowledge this subtle, yet fundamental challenge—that the very presence of researchers in homeless families’ lives might alter their behaviors. There is a general dearth of researcher reflexivity. This, in fact, emerges as a clear weakness in the broader field. Researchers need to reflect upon their own roles and presences in the lives of the homeless and to consciously cultivate valid, authentically representative designs and methods for learning about these individuals’ and families’ everyday experiences with education.

Implications of My Work

Regardless of the methods or theories I employ or the levels of abstraction at which I write, the ultimate purposes of my work are to improve students’ and families’ education-related opportunities during and after their experiences of homelessness. I hope to help further inform the fields of research and practice about how conditions of social injustice—such as inadequacies of affordable housing, jobs, quality schooling, and transportation—lead to and perpetuate homelessness. I hope to facilitate systematic collaboration and coordinated action that ensures that fewer families’ fall through cracks in service. In particular, my work is directed toward the differentiation of service to students and families. That is, I seek the development of more nuanced systems of engagement that recognize and respond to the diversity of homeless conditions in appropriate fashions.

While my work—like other social justice-oriented research that critiques entrenched systems of power and privilege—is unlikely to go uncontested, I am encouraged that it appears to have had some effect on the field of practice. Most notably, the recommendations from my extensive research and evaluation work in Pittsburgh, Pennsylvania contributed to the development of the Homeless Education Network (HEN), a consortium of resourceful agencies and organizations in the Pittsburgh region that works to increase students’ and families’ education experiences amid conditions of homelessness. Specifically,

> HEN connects and advocates with interested parties, facilitates discussions among partners, serves as a catalyst for action, creates effective models, brokers resources, and provides a forum for community discussions to create action — all to ensure children and youth who are experiencing homelessness are enrolled, attending, and succeeding in school as mandated by the McKinney-Vento Homeless Assistance Act. (HEN Mission statement)

After 2 years of implementation, hundreds of Pittsburgh area families have benefited from HEN's burgeoning influence in the region. Further, findings from the study that informed HEN's development were disseminated by the Homeless Children's Education Fund, leading to pending changes in state-level legislation on how students' education rights are protected and furthered in Pennsylvania.

Therefore, although social justice research is advanced in contested spaces, it can indeed lead to meaningful change. I firmly believe that such action—that which expands opportunity for those who suffer the brunt of inequity and whose life conditions are most fragile—ultimately benefits us all, for the "full humanization" (Freire, 1970) of all people is dependent upon our fixing of our "dirty, rotten systems."

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Chapter 53
Towards an Understanding of Social Justice in Our Schools: Globalization, Inclusive Leadership and the Transformation of Schooling

Robert E. White and Karyn Cooper

Introduction

This article attempts to view schooling through the lens of social justice and offers some small considerations regarding how the educational system can be made more equitable for all students. The term "schooling" refers to the process of education provided by an educational institution, whereas "education" does not necessarily take place only within schools. As has been suggested by more than one pundit, education has become reduced to schooling and schooling has become reduced to a measurement of outcomes. Now, this is only problematic if one believes that a fundamental purpose of schooling is to get an education that not only prepares a student for work but for life as well. It is the purpose of this article to describe and discuss possible models and strategies that may be adopted in order to assist schools to become places where issues relating to schooling and social justice can be engaged with, explored and enacted.

Globalization and Schooling

Because it has long been known that schools assist in the replication of dominant culture values (Barlow & Robertson, 1994; Cummins, 1995; Wortham, 1995; Young, 1995), it is vitally important that educators become cognizant of shifting patterns in world societies. Now, more than ever before, societies around the world

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are becoming connected through technology. But why has this become such an issue in the world of education today? As a result of the proliferation and advancement of technologies that some say has heralded in the postmodern era, time and distance have fallen softly dead as globalization has overseen a process of amalgamation of disparate world economies in the form of global trading blocs. Due to the ramping up of competition between competing economies, there has been a perceived need on the part of governments worldwide for economies to become ever more vibrant. In fact, corporations exist within the world that have the ability to not only topple governments but also to make the notion of "country" an obsolete term (Castells, 2000). Globalization isn't just about turning services into commodities for trade or about "harmonizing" in a race for the bottom in jobs and social services, it is also about turning the purpose of schools to the values of the market, as shown in the Asia Pacific Economic Consortium's (APEC) education agenda for schools to become more open to business initiatives (Keuhn, 1997). It is also about fostering the idea of a competitive marketplace and training a labor force geared to reaching the economic goals imposed by industry and business groups. As a result, there is growing pressure to make the perceived needs of business and industry the primary goals of schooling in order to increase profit margins and the accumulation of capital rather than to address imbalances in the lives of minority groups (Fernandez-Balboa, 1993) and individuals through positive social justice initiatives.

While there may be many positive outcomes to globalized societies, the problem is that, as a result of educational policies emanating from issues relating to increasingly globalized societies, schooling is becoming increasingly standardized not only in terms of assessment and evaluation but also in terms of processes, policies and procedures. As world cultures, pushed by superimposed technological imperatives, succumb to homogeneity; as transnational companies, dependent on constantly expanding markets, gain greater control over government decision-making processes worldwide; and as the division between the rich and the poor of the planet widens, it is crucial to reconsider what we expect our students to inherit and become part of (Bates, 2001). Therefore, it is of vital importance that administrators, teachers, students and other stakeholders in the school system become even more involved as designers of our social futures (Barrell, 1997), especially as schools experience ever-increasing diversity and difference (Bates) around the globe.

Although education is seen as having transformative potential for society through its relation to the "knowledge economy," administrative thinking and action can still be informed by considerations of curriculum, pedagogy and evaluation, within the context of concerns over difference, social justice and democratic development for students not just locally, but nationally and internationally as well.

If corporations are able to superimpose their own values or the values of the marketplace on the educational system, then, in effect, it is the corporations themselves which are assisting not only in the reproduction of dominant culture values but in the creation and replication of new marketplace values. Differences in associations of ideas and ideologies between educators and their counterparts in the corporate world may indicate that opportunities exist for corporate interests to manipulate school culture, to exert influence over teaching and testing, and to encourage their own brand of dominant culture values (Barlow & Robertson, 1994; Boyles, 1998; Winner, 1997; Wortham, 1995). At issue is the question of the role of social justice within competing notions of greater order and control over the process of schooling.

Lack of information on the part of teachers regarding corporate involvement in education may represent a sort of hegemony (Apple & Christian-Smith, 1991; Giroux, 1983) which may serve to marginalize students who do not have cultural capital similar to their classmates (Livingstone, 1999; Wortham, 1995), who therefore cannot gain access to the dominant culture, and who will continue to be a powerless, voiceless and oppressed underclass within the society in which they live (Corson, 1995). As an issue of social justice, which has implications for us all, it is vital that educators, specifically administrators and teachers, understand whose interests educational policies are really serving, as well as who the major beneficiaries of these policies are.

Social Justice and Schooling

As education becomes commodified around the world, students are being forced to become more competitive. As a result, some students may experience greater levels of anxiety, social and physical disorders that can result in student (and teacher) burnout, disengagement and hopelessness while others, who have the necessary capitals to succeed under such circumstances, thrive. Such circumstances breed an inequitable society, a society that is meritocratic rather than socially just.

Social justice is generally considered to relate to the creation of a society based on principles of equity and equality, of understanding and valuing human rights, and recognizes the dignity of every individual. For purposes of discussion, social justice is considered to be an ideal condition in which society members have the same rights, security, opportunities, obligations, social benefits and fair treatment (Garner, 2004). The emergence of concepts relating to social justice occurred mainly in the latter part of the twentieth century and serves to distinguish between those who are more privileged in society and those who are not. It has long been maintained that if the society were truly equitable, all people would be equal. By the same token, if everyone within a given society were truly equal, then there would be no need for such a term as social justice. Unfortunately, such terms and such conditions do exist within societies around the globe, and, consequently, “social justice” can devolve to nothing more than a politically correct term that really only identifies those who are excluded, as if those who are marginalized require further marginalization in order for false prophets to introduce personal agendas that have been referred to as “social justice for me.”

Because schools represent, to some extent, microcosms of society and because schools are one of the last bastions where large numbers of impressionable children congregate, these institutions are positioned to be able to promote dominant culture values, values that are being drawn increasingly in line with market place and consumer values. On the obverse side of the coin, schools are also in a position to become more proactive in terms of attempting to create a more inclusive society that has, at its core, a valuing of social justice. Although schooling tends to promote dominant culture values, the challenge is for schooling to become proactive rather than reactive. Our schools need to become ever more inclusive and socially just in order to engage minorities, if we are to survive as a society. As Bauman (2002) notes, we need to sacrifice in order to subscribe. In this case, we need to sacrifice our prejudices in order to belong to a society our children would want to inherit. Consequently, individuals, groups of individuals and minorities must be able to "fit in" without fear of assimilation and destruction to the cultures that they have brought with them and which continue to be a valuable and valued part of their heritage.

Deinstitutionalizing Schooling

What follows are suggestions that may help to situate schools as places of education. Hopefully these ideas will help to forge a middle ground or provide a point of balance in the face of encroaching globalization on the one hand and the time warp that schools find themselves in terms of attempting to apply outdated ideas and processes in an era of increasing demands and conflicting notions about what "good" schooling looks like.

The first concept that appeals to us is the idea of schools as places of safety for students and educators (Cooper & White, 2004). Building a community is a term that can frequently be heard around schools, but what does this look like in action? First of all, the school must commit itself to creating a safe haven for all. This can be agreed upon at a general staff meeting, but it is up to each individual teacher and the administration to keep the profile sharp. Modeling respectful behavior goes a long way in assisting students to feel that they can bring forth issues, engage with learning in a meaningful way, and live and work in a kind and supportive atmosphere. It won't happen overnight but, if teachers and administrators take the time to get to know their students and their students' needs and wants and model respectful behavior, educators will be better equipped to deal with interpersonal issues and will be able to plan lessons that take student needs into consideration. This is the first step towards differentiated learning and a more socially just school system.

Fullan (2001), however, suggests that achieving lasting change is elusive because of the isolation faced by teachers and the competing pressures of the reality of schooling in these global times. Ainscow and Sandill's (2010) article on inclusive leadership in education looks at creating an inclusive and, therefore, a socially just culture within a school that helps to eliminate social exclusion stemming from negative responses to diversity in race, social class, ethnicity, religion, gender and ability. These authors believe that education represents a basic human right and is the foundation for a more just society. However, within any school:

> The development of inclusive practice is not…about adopting new technologies of the sort as described in a fair amount of existing literature.… [I]t involves social learning within a given workplace that influences people's actions and the thinking that informs those actions…. The implication is that a methodology for developing inclusive practices must

> take into account social processes of learning that go on within particular contexts. It requires a group of stakeholders within a particular context to look for a common agenda to guide their decisions of practice and, at much the same time, a series of struggles to establish ways of working that enable them to collect and find meaning in different kinds of information. (Ainscow & Sandill, 2010, 403)

Ainscow and Sandill conceptualize the school as "a community of practice" defined as "a social group engaged in the sustained pursuit of a shared enterprise" (2010, 403) and is seen by these authors as a way to negotiate meaning through social action. Angelides, Antoniou, and Charalambous (2010) provide conditions for success in inclusive and socially just education through a case study of a school in Cyprus. In such a school, difference is welcomed as a learning opportunity, rather than as a predicament, a problem to be fearful of, or an issue to be dealt with. A socially just school is an ideal to be striven towards and it depends upon attitude, energy and time. When we believe that everyone has been included and that we have met everyone's needs, it is time to begin again, for we have surely ignored someone, or needs have changed, or we have only been partially successful in meeting existing needs. Angelides et al. address this in terms of inclusive school cultures:

> The development of inclusive cultures in schools creates a community which is characterized by safety, acceptance, and collaboration. In this type of community, all are valued, and this forms the basis for higher achievement by all students. The principles that emerge out of inclusive cultures guide decisions about policies and the everyday practices of school so that the learning of all is supported through a continuous process of school development. (Angelides et al., 2010, 322)

Three basic conditions contributed to the success of this school in developing a socially just environment; children felt loved and cared for in the school environment; the school provided opportunities for acceptance, appreciation and success of all children, and also helped to provide the parents with support and guidance. This was accomplished through the involvement of teachers and co-teaching within a collaborative culture premised upon love, care, acceptance and involvement of children and the involvement of parents and the community (Angelides et al., 2010). While it is a well-known fact that collaboration between schools and families lead to more inclusive and socially just environments on both sides, it is still a "project in the making" for many schools to become used to the idea that parents are important and necessary members of the school community. In addition to encouraging familial support, school leaders may benefit from becoming more aware of patterns of globalization so that they may be able to lead their schools in a more socially just manner.

A Perspective for School Leaders

Many leadership styles allow for some form of democratic interaction. The entry of critical approaches into the leadership arena has provided valuable alternatives for those interested in pursuing issues of social justice (Ryan, 1998) through shared power concepts (Capper, 1993) such as emancipatory leadership (Corson, 1998) and critical leadership strategies (Ryan) which reunite facts with values (Foster, 1986). Key to the understanding of education as an extension of social justice is the view that race, culture and ethnicity (Reyes, Velez, & Pena, 1993), not to mention issues of gender (Sears, 1993) and disabled students (Bishop, Foster, & Jubala, 1993), must be relocated to the heart of democracy. School as a moral institution holds the public school administrator legally, professionally and morally obligated to be responsible for the processes and outcomes of schooling (Greenfield, 1993). Artful leadership must be built on an aesthetic interest above that of the business mode by pledging itself to the conscious and critical reconstruction of an ever-changing culture (Maxcy, 1998).

Although research in educational leadership does not always develop practical aspects relating to the valuable issues addressed, Specht and Young (2010) outline a collaborative process in schools that may help children reach their highest personal achievement in all spheres of education: (1) The first days of schools are instrumental in building class climate; (2) staff should develop positive support structures and behaviors; (3) student success is as unique as the individual child; (4) expectations for students should remain consistent depending on the school context, consistency is key; (5) administration should encourage staff to be respectful, caring and compassionate as teachers by providing an environment that emulates those qualities; (6) engage the entire community, ask students and parents for their input; (7) recognize the need for socialization as a key part of education, growth and development for all students; (8) differentiate instruction and engage all students to be challenged in curricular material to feel successful; and (9) engage families in the schooling process, be it directly or uniquely, to ensure familial support (Specht & Young, 2010). The authors encourage educational leaders and engage the reader in understanding the need for all educational stakeholders to work collaboratively to optimize the classroom environment.

Angelides et al. (2010) highlight the importance of distributive leadership as key to inclusive practice and a more socially just education. The authors state that inclusive leadership should include the collective mentality of the entire community, encourage the diffusion of barriers and demonstrate more inclusive social practices through modeling appropriate behavior. These authors emphasize the value of school culture in creating a school climate supportive of democratic and socially just practices. Five themes – the involvement of teachers, co-teaching, a collaborative school culture, an ethic of caring, acceptance and involvement of children, and the involvement of parents and the community – represent a collaborative effort on the part of the educational leaders, staff and community to foster a supportive educative environment for all.

Raffo and Gunter (2008) describe a variety of leadership frameworks that encourage a socially just school environment to flourish. The researchers examine plausible policy and procedures of social inclusion and discuss the importance of engaging staff in developing a socially inclusive and just environment. The authors examine functional and socially critical perspectives in implementing school policy that addresses economic and cultural diversity. Delivery, localization and democratizing are three policy initiatives highlighted. Raffo and Gunter further note that implementation of policy is equally as much a process of carrying out government policy, as it is an effort to reduce social exclusion in our schools. Through creating examples or engaging in theory, this article encourages school leaders and educators to examine their practices and to become more cognizant of their own educational practices regarding social justice. The next two sections deal with examples of policy issues that can benefit from further examination by educational leaders in the pursuit of a more equitable system of schooling.

At Issue: "Zero Tolerance" Policies

Unfortunately, as a result of educational policies emanating from issues relating to increasingly globalized societies, disciplinary policies in many schools have begun to shift toward treating children in ways that closely resemble a version of the adult criminal justice system (Daniel & Bondy, 2008). Consequently, many North American schools appear to have adopted a "legalistic" view of school management that puts children in untenable positions. This is exemplified in a very controversial and not very well-debated topic known as the "Zero Tolerance Policy."

Zero tolerance policies are school district policies that specify predetermined consequences for particular violations (Sughrue, 2003). Such policies were originally designed to punish those engaging in acts that potentially put themselves and/or others at risk of harm or danger. Over time, zero tolerance policies have come to include many types of punishable behavior, ranging from possession of drugs, licit or otherwise, to real or symbolic weaponry such as toy guns. Insubordination and classroom disruptions (Schwartz & Rieser, 2001) have also come to be included in this "catch-all" policy, even though many of these items pose little threat to school safety (Dunbar & Villarruel, 2002, 2004; Henault, 2001; Sughrue, 2003; Villarruel & Dunbar, 2006).

This policy, implemented in schools over the past number of years to address a perceived increase in violence and to provide a safe environment for our children, has received mixed reviews from many different school boards throughout Canada and the United States. Ambiguity concerning what constitutes expulsionable or even suspendable offenses has led to growing confusion and disgruntlement from various factions of the school communities about what exactly zero tolerance is and who it is intended to serve.

In order to explain public discourse around issues of school violence, the original impetus for zero tolerance, Devine (1996) claims that public perception frames two diametrically opposed views – a "right-wing discourse" which views schools as being out of control and a "mainstream liberal discourse," which views school violence as "a result of student alienation" (21). The view of schools from right-wingers is that schools are in moral and behavioral decay. This view blames the victims, the students. The opposing view suggests that if children are absorbed in learning, behavior problems will disappear. Zero tolerance policies have met with criticism from stakeholders and from the media. Some critics suggest that the policy and the way it has been implemented leave too much discretion in the hands of those who exercise it, while others view the policy and its trappings as inflexible and intolerant. While some claim the policy is not enforced uniformly, others claim it is enforced inappropriately. Some advocates request less discretion on the part of the implementers, while others request more flexibility to deal with issues on a case-by-case basis.

It is evident that there exist varied views on zero tolerance policy that include its intent and its viability to address the perceived problem of school violence. Further to this, according to McNeal and Dunbar (2010), urban school principals tended to align themselves with the perception that schools are in a chaotic state. Rural school principals, however, saw the policy as an irrelevant intrusion that bore little relationship to the communities they served. By these examples of urban and rural school administrators views, a zero tolerance policy constrains administrators simply because it does not allow for recognition of differences or individual situations (Ableser, 2002). Accordingly, Merrow (2004) suggests that physical, emotional and intellectual safeties are necessary to maintain a socially responsible school. While a zero tolerance policy is intended to maintain a strict policy of safety for its students, such "inclusive" policies mandate standard operating procedures for all offenders, even for the first offense. As a result, written policies tend to become iron clad and this may not serve the best interests of students. Consequently, if the policy is not for the benefit of all students, then it is not good policy (Cooper & White, 2004). As MacNeal and Dunbar (2010) imply, are we merely symbolically and practically replicating an unloving society as we teach our children to design a single set of guidelines to be used for all types of unacceptable behavior ranging from verbal threats and physical violence to dress code violations? This relates to the equity versus equality issue because zero tolerance policies offer up a standardization argument in that all students are treated equally, whether they are all the same or not – and we know that they are not.

A further finding from the study by McNeal and Dunbar (2010) notes that a disproportionate number of minority groups are negatively affected by zero tolerance policies, rendering such policies socially unjust. In theory, zero tolerance policies were intended to preserve safe school environments. However, suspensions and expulsions began to increase to alarming proportions particularly for minority students (Skiba & Leone, 2001). In discussing suspensions from school as remedial practices, Ableser (2002) feels that zero tolerance policies create a false sense of security because suspension merely displaces the problem from our schools to the society in general, negating valuable opportunities for the development of appropriate behaviors and validating a cycle of failure culminating in higher dropout rates.

Circumstances leading to suspension of students need to be investigated on an individual basis. The intent of the student accused of violation is an area of concern that is often ignored. Alternatives to suspension may be considered to suit the violation. If and when students are suspended for serious incidents, they may be automatically referred to outside counseling and law enforcement agencies. Suspension should be used sparingly and with extreme caution. Less serious violations may be dealt with in conjunction with peer mentoring programs in order to develop and maintain lines of communication within and outside of the school environment. Curwin and Mendler (1999) suggest that "zero tolerance is another example of the road to hell paved with good intentions" (119). While zero tolerance policies send a powerful message to students, staff and parents that violent, aggressive behavior is not acceptable in our schools, it also succeeds in clouding important distinctions between victim and aggressor, thus making equity and, therefore, socially just schools increasingly elusive.

As such, zero tolerance policies represent an effort to apply a morality of authority that demands respect and fear. In this sense, it is fascist in that it fails to provide students with the ability to think critically about authority relating to democratic moralism (Ableser, 2002) and, as such, it is anti-democratic. The positive correlation between suspensions and future dropout rates implies that these students are marginalized by the very system that has promised to protect them. Issues of fairness come into question when we talk about extreme consequences of discipline that have little to do with school safety or the improvement of student behavior. In any case, what appears to be conspicuously absent is the voices of those who are most often directly affected by such policies, the students themselves.

McNeal and Dunbar (2010) address this issue of the suspension of minority students in practical terms by interviewing a group of urban high school students who are directly affected by the zero policy. They found that students and other stakeholders could benefit by being brought into the discussion, rather than having a "sudden death" policy that harms rather than guides students. Skiba (2000) concurs and goes on to suggest that we need more graduated policies that match offenses with consequences, as each new outbreak in school violence appears to yield increasingly severe punishment in terms of school discipline. In short, we appear to be creating new problems in dealing with existing issues. As it stands currently, zero tolerance policies serve to recreate the very symbolic violence (Bourdieu & Passeron, 1979) that they are employed to eradicate. According to Daniel and Bondy (2008), such disciplinary policies must not criminalize our youth but should rather engage them in a problem-solving process. Given our current efforts to manage change and control our school environment, we seem to have defaulted to using a model that is strikingly similar to that being used in penitentiaries. Even such penal terms such as "lock down" and "color codes" have been implemented in schools. However, there is no penitentiary in the world that is truly rehabilitary, as they all use various forms of symbolic or concrete incarceration. With the importation of such a paradigm firmly in place, how socially just can our schools really be, not only for students but for teachers as well? In fact, Jull (2000) suggests that teachers are directed to implement, support and enforce school codes of conduct whether they agree with them or not, representing a symbolic violence against teachers. If left unexamined, teachers may, themselves, become perpetrators even while considering themselves to be upholders of the tenets of social justice.

Zero tolerance policies represent a type of binary thinking and, as such, they do not recognize subtleties, but rely on equality of consequence without considering equity of intent. Equity must come first in order to achieve true equality. More consideration needs to be directed toward the individual social contexts of conflict and uneven distribution of social power relations that are part of each school's social climate (Jull, 2000, 5). Zero tolerance policies typically represent a kind of "triage" model that merely has a nice ring to it. Such policies have not been proven to effectively reduce youth violence and serve only to temporarily displace the issue by returning it to the larger society (Jull). This procrusteanization of policy serves the "factory" model of education very well but it does little to advance transformative practices within schools. Such transformative practices represent a form of social justice that is much needed within the school edifice.

At Issue: "Inclusive" Education

The term "inclusion" is an interesting word in its own right. It is often construed, in educational jargon, to refer exclusively to special education. Thus, its connotation, how the term is used, differs from its denotation, what the word actually means. Theoharis and Causton-Theoharis (2008) expand the meaning of inclusion to embrace all marginalized students – not just special education. For the authors of this piece, inclusion is taken to refer to inclusivity in a general sense and thus, this notion of "true" inclusion may be twinned with notions of social justice and equity. Armed with a broader understanding of what it means to be inclusive, school leaders advocate for *all* marginalized groups within their school community. This broader definition for inclusion helps to eliminate social exclusion in response to diversity (Rice, 2006).

Increasing diversity of school-aged population in tandem with demands for educational reform and accountability poses enormous challenges for school leaders on a worldwide basis. Inclusive education was originally considered as an approach to educating children with disabilities within regular school settings. Internationally, however, it is being increasingly seen more broadly as a reform that supports and welcomes diversity among *all* learners. In fact, inclusive education has emerged in many school districts as the norm rather than the exception, the expectation rather than the ideal, and has been mandated in a growing number of locations. Consequently, it no longer is debated whether or not inclusion *should* occur, but rather *how* to implement it.

In an effort to create "systemic, sustained and differentiated professional development for social justice" (4), Kose (2007) recommends three categories of professional development: professional development for the whole staff, professional development for specific groups within a staff, and professional development based on specific needs of individual teachers. In order to bring "suburban and urban students together, cultivating individual talents and needs, and developing students as global citizens and environmental stewards in an interdisciplinary school" (4), Kose maintains that all professional development, such as differentiating instruction, diversity discussions and critiquing curricula through a multicultural lens, be focused on achieving these goals. Teachers require opportunities to meet as core teams, subject area teams and mentor groups to focus on curricular requirements and on acquiring knowledge and creating PD activities for individuals and groups (Kose). This works in conjunction with a school-wide focus on disrupting current marginalizing conditions in the school. Such a framework allows for teacher learning on three different levels: school-wide learning, group planning and individual professional development needs. This organizational framework constituted of diverse groupings allows teachers to implement programs at their discretion and promotes "sustained and systemic professional learning" (Kose, 3). Theoharis (2010) exemplifies this approach in an article describing the strategies employed by six social justice leaders to counteract school structures that marginalize, segregate and impede achievement, a deprofessionalized teaching staff, a school climate that needed to be more welcome for marginalized families, and low student achievement.

While "full" inclusion has the benefit of allowing all students to receive the same *level* of education by eliminating pullout programs and "special" classrooms, it may not serve the purposes of students who cannot benefit from being mainstreamed into regular classes. These students may be physically incorporated into regular classes, but the *quality* of their education may suffer as a result of not having access to specialized equipment and/or instruction. While it is agreed that mainstreaming students allows the marginalized students who would ordinarily be segregated in smaller instructional groupings to learn more about the mainstream culture of the regular classrooms and that "regular" students can benefit enormously from learning about students with specific and general disabilities, the key word becomes "balance." Any policy that requires all students to fit into a particular mold without consideration given to unique characteristics is not a policy that tends to operate in all students' favor. As such, it is a policy that tends to exclude and marginalize even as it draws students together.

Inclusion as a Form of Social Justice

Salisbury (2006) posits that although administrators and schools may differ in their definition and stages of progression toward fully inclusive and socially just programming, similarities can be found in administrative qualities that are conducive for promoting these practices. These include committing to social justice, nurturing the staff's attitude and core beliefs to embrace diversity, using language that supports the inclusion philosophy, and soliciting support from parents and community. Salisbury notes that the principal is key in developing inclusive and socially just schooling. Given this point of view, Edmunds, Macmillan, Specht, Nowicki, and Edmunds (2009) note the importance of the principal's role in developing and maintaining an inclusive school environment. To this end, the assessment of professional development needs is of major importance for principals. Through the use of action research methodology, principals can become more aware of conditions necessary for the support and sustenance of inclusive practices within their schools. Such an endeavor begins with careful scrutiny of current relevant literature. Principals must have access to the most current information about inclusive practices, as it is they who are ultimately responsible for implementing truly inclusive practices, policies and procedures within their schools. Once the administrators are knowledgeable concerning inclusive practices, professional development opportunities can be implemented in order to address all aspects of inclusion.

However, principal knowledge of inclusion is not a satisfactory prerequisite on its own, as teachers and support staff must also "buy in" to a more inclusive model. Because teachers and support staff often feel inadequately prepared, it is critical that principals address the needs of teachers and support staff within their schools. Otherwise, by avoiding proper professional development, there are risks that teachers' "perceptions of inclusion will swing from positive to negative as their frustration with its implementation grows" (Edmunds et al., 2009, 18), because avoiding such necessary professional development fosters a climate of resistance to change (Rice, 2006).

As noted by Angelides et al. (2010), special education teachers can become a resource to classroom teachers and educational assistants by providing knowledge on inclusive practices. Such specific, timely and appropriate professional development establishes "harmonious and synchronized interactions of all school staff" (Edmunds et al., 2009, 19). Thus, the special education teacher, in collaboration with classroom teachers, can instigate positive social change within their sphere of influence by involving teachers in co-teaching and by providing examples of what an inclusive culture looks, feels and sounds like. Rice (2006) refers to the special education teacher as the "cornerstone" to developing a collegial climate throughout the school, and, as such, special education teachers may be key allies in supporting inclusive leadership strategies. Subsequently, three administrative tasks as identified by Riehl (2000) include being supportive of creating inclusive schools, encouraging new understandings of diversity, nurturing inclusive school cultures and building relationships between school and community can help to promote a more inclusive atmosphere for students, staff and the surrounding community.

Another suggestion for supporting inclusive socially just schooling is for the leader to maintain a vision of what a truly socially just school looks like. This is an ideal for which to strive. When we believe that all perspectives, voices and ways of being have been included, it is time to begin again to ensure that no one has been left out and that all concerns are not only being heard and listened to but also attended to. In the words of Gwendolyn MacEwan (2007), "…the moment when it seems most plain is the moment when you must begin again" (92).

Community support is also an important attribute of inclusive schooling. Salisbury (2006) states, "The most frequently mentioned barrier identified by respondents was the negative attitude of teachers and parents" (71). Of course, the task here is to change negative attitudes into more accepting attitudes. This is a daunting task for anyone, seasoned and novice school leaders alike. However, the prize is well worth winning. Riehl (2000) advises principals to coordinate services among stakeholders and for the school to become the focal point of the inclusion movement:

> Schools are viewed as the most logical choice to be the anchor or hub of services, since children interact with schools on a continuous basis and problems can be detected and addressed as they arise. (Riehl, 2000, 67)

Riehl (2000) also raises some unsettling issues, including how principals "reproduce, sometimes unwittingly, conditions of hierarchy and oppression, in particular by fostering compliant thinking rather than critical reflection" (59). Managerial types of leadership tend to foster this, whereas many other types of leadership – for example, emancipatory, distributive and critical, to identify just a few styles of leadership – hold inclusion central to their system of values. Further to this, Riehl introduces another troubling notion that, if school leaders truly become aware of how much marginalization exists within any given school system which the system is actually causing, they would choose not to work there:

> A genuine commitment to diversity would require administrators to attend to the fundamental inequities of schooling, to disavow the institutions which they purportedly lead, and to work toward larger projects of social and institutional transformation. (Riehl, 2000, 58)

However, for those who are committed to truly inclusive practices, this is viewed as an opportunity. Issues with the educational system marginalizing students are often the result of policies delivered by non-practitioners who, incidentally, rarely avail themselves of current research on matters educational. Thus, by influencing and shaping our fully inclusive schools rather than by advocating for "full inclusion," are we not already working toward developing lasting change of a more socially just nature?

Teachers who have little background in inclusive practices require not only opportunities to learn effective instruction methods to meet the needs of all students but also the time to discuss the results of their efforts. Unfortunately, according to Edmunds et al. (2009), not all principals have a complete understanding of inclusive practices, themselves, and their active participation is essential in assisting them with discovering strengths and weaknesses related to inclusive practices that exist within their own schools. In short, we need to concentrate on leadership as well as teaching. Oluwole (2009) chronicles one principal's struggle between continuing with full inclusion at his school and doing what is best for a particular student. Ultimately, as a result of a legal and ethical dilemma, the principal tendered his resignation because the inclusive education program was benefiting the special needs population in his school less that the thoughtful accommodations that were already in place. Ironically, the so-called inclusive education program was less inclusive than the program it replaced! Experiences such as these beg the question of how effective "full" inclusion is, as it may not work in every instance. In short, full inclusion as it is frequently practiced has its own set of limitations because, like zero tolerance policies, full inclusion does little to advance true inclusionary practices within schools. One may begin to forge a way forward by questioning one's own beliefs about such policies and the system that reinforces them.

Furthermore, as educators, we strive to practice what we preach. While this is increasingly important as an administrator, ofttimes our leaders experience conflicts that result in contradictions and conflicts in the treatment not only of students but of staff members as well. This brings to light the idea that we must question ourselves throughout our careers and change and adapt our beliefs as different policies such as zero tolerance and full inclusion are implemented.

Inclusive leadership is quickly gaining traction in schools and school systems in any area where significant diversity exists. Since every student is unique in his or her own way, it can be argued that diversity exists in every educational landscape, and, therefore, inclusive leadership is and will become one of the most important issues facing administrators. Such inclusive leaders adopt and live a set of values – including self-esteem, respect for others, values beyond self-interest and restraint in the exercise of power – that place relationships at the focal point of educational policies, practices and procedures. Those values define schooling in ways that standardized test scores can never do. Such responsibility for inclusive leadership in creating supportive, inclusive schools will need to be found not only within the school's administration team but also among teachers, parents and support staff members (Mayrowetz & Weinstein, 1999). All staff members and, indeed, all stakeholders, including the students themselves, must strive in concert to meet the needs of every student. In this way, truly inclusive educational practices will be possible within the school edifice.

Conclusion

As a result of educational policies emanating from issues relating to increasingly globalized societies, schooling is becoming increasingly standardized, not only in terms of assessment and evaluation but also in terms of processes, policies and procedures. Thus, due to the exigencies of globalization, schools and their leaders are being held more and more accountable for implementing blanket policies for their school populations and this is, unfortunately, often detrimental to marginalized students. For example, as standardized testing gains increasing value, disadvantaged, minority and disenfranchised groups suffer. In some schools, minority and disabled students are exonerated from taking standardized tests, but even this serves to marginalize them in the face of other students. There are fewer and fewer avenues available for such students to be involved, included and accepted.

"Full inclusion" and zero tolerance policies represent but two postmodern puzzles that serve to exclude students by "one size fits all" policies. By supporting flawed policies such as zero tolerance and notions of full inclusion regardless of the student's ability to subscribe to the mainstream, educators are not serving the student but are responding to convenient policy measures that support order and control – policies which do little to further citizenship and socialization skills among our future leaders and populace. This is an unattractive alternative that may only serve to reproduce the "inmate ethic" and can serve to increase dropout rates and increased crime among disenchanted youth who have not been successful within a system in which they feel that they neither belong to nor are supported by.

This article advocates the deinstitutionalizing of schools in order to gain greater clarity about what some of the advantages are for creating more socially just schools. At issue is the question of where social justice should fit within competing notions of greater order and control over the process of schooling. In short, part of the answer to this question might be inclusive leadership.

As many studies regarding inclusive leadership suggest, it is important to distribute leadership not only among administrators but among teachers as well if in fact socially just schools are to be made possible. In this regard, school leaders can benefit immensely from listening to the voices of students, by motivating staff members, and by becoming more aware of the communities within which our students are living. Once these conditions are met, truly inclusive and socially just education can help all students achieve success in terms of each student's personal best. This represents the "trickle-down effect," where all educational stakeholders can feel supported by their educational community and conversely, they can begin to support others. A truly inclusive school provides an excellent example of democracy in action. Sharing leadership is, by its very nature, inclusive. Therefore, truly inclusive schools, by their very nature, are democratic and it takes inclusive educational leaders to forge the way.

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Chapter 54

The State's Responsibility to Fund Basic Education in Public Schools

Raj Mestry

Introduction

Prior to 1994, South Africa was a highly segregated society and apartheid laws placed every citizen in an elaborate and vicious racial hierarchy which dehumanized both the oppressor and the oppressed (Brown, 2006: 512). Blacks were denied the most basic citizenship rights and overt racial discrimination was legal. Racial divisions were also enshrined by law in the education sector. Thus, in terms of per capita grants from the state, white learners received the highest, while black African learners received the lowest. To illustrate this anomaly, in 1994, the state's annual per capita expenditure for learners from the most advantaged schools was R5 403, compared to R1 053 for learners from the most disadvantaged schools in Transkei (Patel, 2002: 175). Thus, the politics and economic imperatives of the state were closely linked to the development of inequality in the larger society through education funding.

The struggles in the education sector, the adoption of the Freedom Charter, the call by a range of social movements for free and compulsory education in the anti-apartheid struggle, and the inclusion of education as a human right in the Constitution (South Africa, 1996a) suggested significant state commitment and investment in education (Ahmed & Sayed, 2009: 203). The post-independent state has been trying to reverse this situation without much success because the basic structures of our education system have not been fundamentally changed as evidenced by the fact that rural, township, private, and former Model C schools[1] still exist with disproportionate

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[1] Model C schools catered for mainly white learners during the apartheid regime.

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resources which impact on teacher quality and learner performance. After 18 years into democracy, there is still everyday occurrences where children are being locked out of schools for not paying school fees or walking many kilometers from home unsupervised, grade 12 learners being made to start classes in March because they did not have the correct color shoes, withholding school reports and textbooks, and parents' labor being bartered for school fees (Tucker, 2008: 6).

Chisholm (2004: 206) asserts that inequalities between urban and rural schools are visible in the provision of financial and physical resources. These infrastructural backlogs and inequalities are very unevenly spread across the provinces and are most notable in rural areas. Infrastructural inequalities are also documented in the School Register of Needs Survey, first conducted in 1996 (Department of Education, 1996) and again in 2000 (Department of Education, 2000). Severe overcrowding is still prevalent in classrooms especially in rural areas of the country (City Press, 2008). For example, in the Eastern Cape,[2] there was a backlog of 10,000 classrooms (Soweton Live, 2008), and thousands of learners were still being taught under trees and in unsafe mud buildings (City Press). According to Vally et al. (2010: 60), of the 27,000 public schools in South Africa, a conducted study estimated that 27 % had no running water, 43 % were without electricity, 80 % were without libraries, and 78 % had no computers. A total of 12,300 schools used pit latrines and 2,500 had no toilets at all. In schools that had toilets, 15.5 % were not in working order. Schools requiring additional classrooms numbered over 10,700. The conditions of many black schools are critical and not conducive to effective teaching and learning. Beinart (1995: 3) emphasized that the effects created by the legacy of the past are still felt by millions of the marginalized groups (Indians, coloreds, and especially the majority Africans).

The government's educational reforms since 1994 have focused on access, equity, redress, quality, efficiency, and democracy. All policy documents that have emerged stressed the principles of social justice, quality education for all, the right to basic education, equality of opportunity, and redress of past educational inequalities among the blacks who have suffered particular disadvantages (Muthukrishna, 2000). Redressing historical imbalances and achieving equity are central policy components in attempts to restructure South African education. Equity and redress have been identified as the operational building blocks for the realization of social justice in education (Motala & Pampallis, 2002: 178). This aspiration is demonstrated in many education policies, such as the post-provisioning norms, rationalization and redeployment of teachers and non-teaching staff, management of school fees, the functioning of governing bodies and the National Norms and Standards for School Funding (NNSSF), and other pragmatic interventions. While inequalities in resource allocation from the state have been removed, inequalities persist for a number of reasons, including the inability of parents to pay fees, the unavailability of qualified teachers in rural schools, and unfavorable teacher-learner ratios, especially in black schools and public schools in general (Motala, 2006: 80). This chapter makes the argument that, despite substantial government interventions to the education system, social justice and equity have not been served adequately by the NNSSF because inequalities based on race, class, and gender persist in the education system. Jansen (in Bogotch et al., 2008: 147) is of the view that sustaining privilege for the few at the expense of the marginalized is justified even in societies emerging from long periods of colonialism and racism.

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[2] South Africa comprises of nine provinces. Eastern Cape being one of the poorest provinces, is one of the nine provinces.

Thus, it is ironic, given the emphasis on redress and equity by the government, that the funding provisions of the South African Schools Act (South Africa, 1996b) appeared to have worked thus far to the advantage of public schools patronized by middle-class and wealthy parents of all racial groups (Chisholm, 2004). Vigorous fund-raising by parental bodies, including commercial sponsorship and fee income, have enabled many such schools to add to their facilities, equipment, and learning resources and expand their range of extramural activities. Poor parents, on the other hand, especially in the former homeland areas, have contributed a disproportionate share of their incomes over many decades to the building, upkeep, and improvement of schools, through school fees and other contributions, including physical labor. A number of schools in poor rural and urban working-class communities suffer the legacy of large classes, deplorable physical conditions, and absence of learning resources, despite a major Reconstruction and Development Program (RDP), National School Building Program, and many other projects paid directly from provincial budgets. Yet, the teachers and learners in poor schools, mainly African, are expected to achieve the same levels of teaching and learning as their compatriots. Such contradictions within the same public school system reflect past discriminatory funding policies in schooling and vast disparities in the personal incomes of parents from all racial groups (Ndimande, 2006: 147). Consequently, unequal racial residual categories from the past now give rise to class inequalities which cut across race. Disparities in funding of the education system are common, and thus per capita grants are useful as a key indicator for equity and social justice which will be used in this paper (Motala, 2006: 79).

In this chapter, inequitable funding practices are highlighted, and the relationship between funding (resources) and educational outcomes, and its implications for equity and social justice in education elucidated. To adequately address this matter, key policy changes over the last 5 years will be documented. It is important to proffer an explanation of how issues of social justice and equity are implicated in the contestations and reproduction of inequalities in society which are now based on class, race, and gender. Cultural and class reproduction in education is not a straightforward process, but rather it is contested on the basis of geographic location (urban/rural), class, race, gender, and sexual orientation. To be able to unpack these processes, given the government's Herculean efforts at social justice through funding, a critical perspective which enables one to understand how issues of class, race, power, and the political are implicated in the funding of schools and how there has been a reproduction of inequalities based on race and class in a system that is ostensibly equitable and ameliorative in its orientation, mission, and funding policies will be utilized (Popkewitz & Brennan, 1998: 4). A critical perspective helps us to understand and explore funding in education as a process that is fraught with contestation in ways that are both political and historical.

Social Justice and Equity

It may be helpful to clarify the terminology social justice and equity. Equity can be described as "equal treatment by race, equal educational opportunity and educational adequacy" (Fiske & Ladd, 2004: 96). Motala (2006) suggests that in addition to equality which is about sameness, equity should also encompass differential distribution to achieve social justice.

Within recent studies of education policy, social justice has been an under-theorized concept. Some studies simply marginalizes or rejects social justice concerns, either because of skeptical postmodernist denial of the tenability and desirability of universalistic principles, or because of an uncritical, problem-solving orientation, or because of a commitment to "value-free" research. However, there is also a significant group of researchers who are unambiguously committed to social justice in education, as evidenced in the growing number of empirical studies which draw attention to the ways in which inequalities are produced and reproduced by post-welfarist education policies (Gewitz, 1998: 469). A wealth of educational resources and school finances were channeled to white public schools during the apartheid era. As a result, school finances were characterized by staggering funding disparities in the schools that served different racial communities. The deliberate lack of state funding for schools, as well as abject poverty within the black communities, led to massive dropouts in black schools (Muthukrishna, 2008: xvii). Essentially, most research in the area of social justice in education examines how inequalities are reproduced through multiple sites of difference and unequal power relations and the struggles against them – that are based on and built out of an entire network of social, political, and cultural relations and practices (Muthukrishna: ix).

Conceptually social justice is viewed as a key component of a government policy that is oriented towards equity, redress, restoration, renewal, and redistribution of resources. This definition is heavily influenced by the position taken by a Symposium on Social Justice (2008) held in Berkeley which defined social justice as "a process, not an outcome, which (1) seeks fair (re)distribution of resources, opportunities, and responsibilities; (2) challenges the roots of oppression and injustice; (3) empowers all people to exercise self-determination and realize their full potential; (4) and builds social solidarity and community capacity for collaborative action." Without conflating equity and equality, a much broader view of social justice is adopted which embraces political, ideological, social, and cultural perspectives (Soudien, Jacklin, & Hoadley, 2001). Scrase (1997: xi) asserts that social justice in education is not simply met by providing a large number of schools, institutions, and training programs. It has to be linked to broader social justice imperatives, such as the full and unhindered opportunity to participate in society's major institutions regardless of class, race, or gender. Connell (2003: 15–19) explains that governments have long been operating from a perspective of distributive justice. For them, as long as schools are provided for the populace, universal literacy programs put in place, or an affirmative action program established, governments are satisfied that they have met their social justice requirements. For Rawls (1971), social and economic benefits are to be distributed fairly in that they guaranteed and proportional for everyone in society. That is, everyone benefits, but the least advantaged benefit the most. In our view this is not enough. The relationship of social justice to education is one that is concerned with fairness, rights, and equal opportunity to participate in one of society's most fundamental institutions.

Social justice is the distribution to the population of scarce resources, such as education. According to Scott and Marshall (2005: 329), such a view of social justice is premised on due process, impartiality, and distribution according to appropriate criteria. Most importantly, social justice in the provision of education needs to translate into a broader educational transformation and empowering process that can be seen to meaningfully translate into positive gains in the classroom, the school, and, in terms of outcomes and upward mobility, especially for historically disadvantaged learners. Social justice in this schema becomes a political act (Elster & Hylland, 1986: 103) because its mission is that of making society and its institutions more democratic, empowering, and transformative (Giroux, 1992: 10). However, in the South African case, as noted by the OECD (Organization for Economic Cooperation and Development), "real expenditure on education from 1995 to 2002 declined as a share of both total government expenditure (from 19.2 % in 1996 to 18.8 % in 2002) and Gross Domestic Product (from 5.7 % in 1996 to 4.9 % in 2002)" (Organization for Economic Cooperation and Development [OECD], 2008: 97). On the whole, household expenditure on education has increased to an extent that those families that pay around R100 for fees are actually struggling to do so. The Schools Register of Needs Survey also shows that black schools still lack the basic resources critical to effective teaching and learning. The situation has been exacerbated by the fact that at the provincial levels, funds meant for education have actually declined, largely due to competition from other social sectors such as health and housing. The net effect is the reproduction of inequalities in education based on class.

To support the argument that social justice and equity have not been supported by the NNSSF policy, I draw on secondary empirical data and then discuss this within the framework of a critical perspective that goes beyond education and the classroom to show how inequalities are being reproduced in a system that is ostensibly equitable and just. The issue of social justice is aptly encapsulated in the preamble to the Schools Act (South Africa, 1996b):

> … the country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing provide an education for the development of our people's talents and capabilities, advance the democratic transformation of society, combat racism and sexism and all other forms of unfair discrimination and intolerance, contribute to the eradication of poverty and the economic well-being of society, protect and advance our diverse cultures and languages, uphold the rights of all learners, parents and educators, and promote their acceptances of responsibility for the organization, governance and funding of schools in partnership of the state.

South Africa has focused primarily on the complex issue of racial equity in the distribution of governmental resources (Jansen & Amsterdam, 2006: 1x). Equity, as the term is used in education finance literature, is a relative concept that is based on comparisons of spending across schools and provinces. An equitable finance system is one that reduces to a "reasonable level" the disparity in spending (Downes & Stiefel, 2008: 222).

The government's efforts since 1994 to attain equity and redress in education have faced considerable obstacles and contradictions, largely rendering the quest for social justice rhetorically desirable but practically elusive. The emerging pattern is one where changes have been mainly symbolic and linked to the political climate (Jansen, 2000), and the inequality in funding can best be ascribed to state bureaucracy and limited capacity at provincial level to implement policies. We also attribute this problem to the nature of the post-apartheid state, whose fundamental economic model is driven by an imperative that emphasizes economic growth rather than a radical redistribution of resources.

Inequalities were apparent in differential spending, which had an impact on access to, and the quantity and quality of education on offer to black and white. Typical indicators were literacy levels; school completion rates; learner-teacher ratios; number, quality, and qualifications of teachers; and availability of different types of resources. On all indicators, the poorest off were Africans living in the previous homelands and on farms and in townships (Chisholm, 2004: 204). This means that at the microlevel, which is the school and classroom levels, schools and the education system as a whole become agencies of social and cultural reproduction of inequalities within the state, civil society, economy, and political spheres of South African society. As Giroux (1997: 71) notes, even "where resistances, agency and mediation appear in the accounts of the excluded majorities in the schools" the current constructs of school funding engender inequalities that enhance a "paralyzing pessimism among the poor that consigns them to the logic of defeat and domination rather than to the imperatives of struggle and emancipation."

In this schema, social justice can be seen as a deliberate intervention that challenges fundamental inequities that arise, in large part, due to the inappropriate use of power by one group over another. Inequities may be material, such as differential funding, instructional materials, facilities, and resources. This is how inequalities are being reproduced, especially on the basis of class. As noted by Reschovsky (2006: 43), inequalities continue within the education system, irrespective of improvements in funding, because "many students, especially in rural South Africa, continue to face dilapidated schools, few, if any, textbooks and school supplies, and poorly trained teachers." Thus, structural constraints continue to erode any gains that may accrue from improvements in funding.

Post-apartheid Policies on Funding

All South Africans have the right to a basic education, including adult basic education and further education. According to the *Bill of Rights* entrenched in the country's *Constitution* (South Africa, 1996a, Section 29), the state has an obligation, through reasonable measures, to progressively make this education available and accessible to all. The South African Schools Act (South Africa, 1996b, Section 3) prescribes that school attendance is compulsory from the ages 7 to 15 years (or Grade 1 to Grade 9). However, what is not clearly stated is the fact that the state is obligated to provide free education to its citizens. The view that every child has a right to quality education and schools should ensure their access is essential to the discourse on rights-based democracy and social justice (Gardner & Crockewell, 2006: 7). Based on the policies of the apartheid regime, the unevenly distributed resources were based on race/ethnicity and socioeconomic class such that inequities have been continually reproduced. Thus, for a large number of learners participating in today's mainstream, schooling is not only problematic but virtually impossible.

The state funding policy environment for the education sector in South Africa is framed by the South African Schools Act, which stipulates that "the state must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in educational provision" (South Africa, 1996b, Section 34.1). Thus we see a state that is concerned with redistributive policies rather than the complete overhaul of the funding system in favor of blacks. This explains the ameliorative nature of funding reforms – hence, the perpetuation of inequalities in a state that is concerned with a macroeconomic policy focused on growth. A number of policies at both the national and provincial levels have been promulgated to ensure the implementation of equitable funding mechanisms in South African schools. Notable among these have been the Equitable Share Formula (ESF) and the NNSSF. The former policy focuses on interprovincial equity, while the latter focuses on more equitable inter-provincial expenditure (OECD, 2008: 98). Calculated by the National Treasury, the ESF reflects provincial variables, such as the size of the school-age population, the number of learners enrolled in public ordinary schools, the distribution of capital needs, the size of the rural population in each province, and the size of the target population for social security grants weighted by a poverty index (OECD: 100).

In terms of increasing access and equity in the school system, the main policy mechanism has been the Education Laws Amendment Act of 2005 (South Africa, 2005), which ushered in an era of "no-fee schools." This policy targeted the poorest two quintiles (i.e., 40 % of learners nationally), and such a bold move by government was aimed at addressing the need for access and equity for the marginalized in rural and peri-urban township schools who were struggling to pay fees. It will be argued that such policies have not adequately addressed the issue of equity and social justice because of broader macro educational and social issues that enhance the perpetuation of inequalities in the education system. In this context, the nature of the post-apartheid state makes it difficult to bring about radical reforms in the financing of education, because it is relatively autonomous from local and international capital.

Amended National Norms and Standards for School Funding

The preamble to the South African Schools Act (South Africa, 1996b) states that:

> …this country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of our people's talents and capabilities…

Table 54.1 Resource targeting table based on condition of schools and poverty of communities

School quintiles from the poorest to least poor	Expenditure allocation	Cumulative percentage of schools	Cumulative percentage of non-personnel and non-capital recurrent expenditure	Per learner expenditure indexed to average of 100
NQ 1: poorest 20 %	35 % of the resources	20 %	35 %	175
NQ 2: next 20 %	25 % of the resources	40 %	60 %	125
NQ 3: next 20 %	20 % of the resources	60 %	80 %	100
NQ 4: next 20 %	15 % of the resources	80 %	95 %	75
NQ 5: next 20 %	5 % of the resources	100 %	100 %	25

Source: Resource targeting table (South Africa, 1998)

The Schools Act imposes important responsibilities on the state in respect of funding the public schools derived from the constitutional guarantee of equality and recognition of the right of redress. The Act provides that the state should develop norms and standards for school funding and that they should fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in education provision.

The purpose of the NNSSF regulations which came into effect in 1998 (South Africa, 1998) and subsequently amended in 2007 (South Africa, 2006b) is to effect redress and equity in school funding, with a view of progressively improving the quality of school education, particularly in previously disadvantaged schools. The NNSSF focuses on more equitable interprovincial expenditure (OECD, 2008: 98). This policy requires that each provincial education department (PED) rank all its schools from poorest to least poor, at first equally weighted between the physical condition, facilities, and crowding of the school and the relative poverty of the community around the school (South Africa, 1998) but changed in 2003 to take only household income into account (Department of Education, 2003a). Since 2008, this ranking has been further specified and differentiated according to the income dependency ratio (unemployment rate) and level of education (literacy rate) of the school's surrounding community (its geographical catchment area). Current policy determines that a ratio of at least 7:1 be applied to the amounts paid to schools in the two outer quintiles, where quintile 1 represents poor schools and quintile 5, affluent schools (Mestry & Bisschoff, 2009: 47). Table 54.1 reflects how schools will be funded based on their quintile ranking. For example, the very poor schools classified as national quintile (NQ) 1 will receive 35 % of the PED's budget on resource allocation, whereas NQ 5 schools will only receive 5 %.

While both the NNSSF for non-personnel expenditure and the post-provisioning models contain aspects of socioeconomic targeting, actual non-personnel expenditure constitutes only 8–10 % of school budgets. This means that only a small portion of basic education allocation by the state is targeted towards redress. Except for the

2 % pro-poor weighting, the balance of state spending on schools directed towards the payment of personnel continues to favor historically advantaged schools (Porteus in Veriava, 2005: 4). Such a critique is essential in our understanding of the subjective and objective forces of social and cultural reproduction in our education system. As argued above, the issues of equity and equality, and how class has replaced race, can be easily linked to redress mechanisms to educational outcomes.

Up to 2006, the national school funding policy did not set out minimum per learner funding levels. With varying provincial financial capacity, it was certain that the funding of poor learners across provinces would not be the same (Wildeman, 2008: 3). The contradiction became obvious when it was found that learners who were classified as non-poor in one province were receiving a per learner allocation greater than the poorest learners in another province. This constraint restricted the ability of most PEDs to effect a meaningful distribution of redress funds to the majority of poor learners. The average per learner expenditure distributed by the NNSSF mechanism was R184 in Gauteng and R275 in the Northern Cape, while in KwaZulu-Natal the amount was only R35 (Maile, 2004: 57; Wildeman, 2000: 3). Poverty targeting takes as its point of departure the assumption that certain groups of learners need more resources than others as a result of economic advantage. Based on these statistics, poor schools and learners are persistently disadvantaged and will take much longer to overcome the barriers of the past, thus prolonging the cycle of poor quality education (Wildeman, 2001: 10, 2008: 4). Funding policies that are intended to redress past inequalities actually end up being sources of a serious process of reproducing inequalities based on class, race, and physical location of learners. Because of the inherent contestations in the process of developing these inequalities, the process of social reproduction engendered by funding policies becomes "a unity of social contradictions, unity of change and stability, unity of continuity and discontinuity" (Morrow & Torres, 1995: 8). As such, social justice and equity in education becomes a pipe dream as inequalities engendered by funding policies continue.

The NNSSF added another dimension to the problem of redress. By targeting only the poorest schools, those schools that are located in the middle of the resource-targeting table, the so-called middle schools, became neglected and impoverished. Wildeman (2001: 8) states that the implementation of the funding policy meant that, "these schools qualified for less state funding and in the absence of strong socio-economic parent communities, they faced the danger of real financial deterioration." These "middle schools," as schools that do not exist in abject poverty but which nevertheless lack stable income from user fees, became financially vulnerable because of insufficient funds and were therefore unable to maintain themselves and provide adequate services to learners. In spite of the real increases in the NNSSF allocations, and the fact that more poor learners benefited from redistribution, the problem of middle schools persists. Thus, we see the subtle process in which, as Bourdieu notes, an educational system has specific structures which correspond to both their "essential function" of inclusion and their "external function" with respect to the reproduction of inequalities based on the socioeconomic status of schools, districts, and eventually learners (Bourdieu & Passeron, 1977).

School Fees

Research undertaken by Fiske and Ladd (2004) revealed that enrolment rates are generally high in primary schools and then drop significantly at secondary school level. They suggest that one of the reasons could be the higher cost of school fees at secondary level. Also, the inability of parents to pay for school fees, uniforms, and transport was the primary cause for nonattendance (Roitmayr, 2003). Many children are temporarily or permanently barred from school because of nonpayment of fees.

According to Reid (2002), as South Africa forges ahead with rebuilding and transforming its education system following the end of the apartheid in 1994, school fees have emerged as a highly controversial issue. Such fees exacerbate a problem-plagued national system of education funding that falls short of meeting even the most basic needs of the nation's historically disadvantaged learners. Roitmayr (2003) contends that fees violate the Constitution (South Africa, 1996a), which guarantees the basic right to education. School fees contradict international law, including the Convention on the Rights of the Child, the international human rights treaty that requires all governments (South Africa is among them) to make primary education free for all. Overt racism in the form of apartheid laws has been replaced by covert racism and class domination in the form of school fees. Brown (2006) suggests that as a result, new educational injustices are preventing poor and marginalized groups from getting universal access to high-quality education in South Africa. There is a danger that schools can deliberately exclude learners and resist transformation through levying exorbitant school fees that will protect the status quo of some of the affluent schools. According to Mestry and Bisschoff (2009: 52), school fees may act as a barrier towards embracing diversity and ensuring that a school does not reflect the broader South African community through the exclusion of those who cannot afford to pay school fees. Ahmed and Sayed (2009: 204) asserts that despite global declarations to abolish school fees, free provision of education by the state seems to be the exception, with the majority of countries charging fees in different forms.

In order to counteract the potential inequalities that school fees may cause, the South African Schools Act specifically creates provisions for school fees exemption policy. Furthermore, the no-fee school policy is contained in the Education Laws Amendment Act of 2005.

School Fee Exemptions

In order to redress past imbalances in education, the Ministry of Education amended school fee regulations. The Education Laws Amendment Act 24 of 2005 (South Africa, 2005), the new NNSSF, and the new regulations relating to the Exemption of Parents from Payment of School Fees (South Africa, 2006a, 2006b) have been amended to give poor parents relief in the cost of their children's education.

There are three levels of exemptions, which may apply if parents cannot afford to pay school fees: full exemption, partial exemption, and conditional exemption. Parents will be granted an exemption based on their income and the number of children attending school. The proportion of parental income and number of children to school fees is determined by a set formula which schools should apply, upon receiving a written application from a parent.

The regulation also makes provision for automatic exemptions based on the following:

- A person who has the responsibility of a person in respect of a child placed in a foster home, a youth care center, a place of safety, or an orphanage
- A person who is a caregiver of an orphan or a child who has been abandoned by his/her parents or who is without any visible means of support
- A child who heads a household

Roitmayr (2003: 400) explains how the school exemption policy hinders access to education. Many families who are eligible to apply do not do so because the process is time-consuming, while it is also likely that the cost of dignity in terms of how parents and learners may be treated at school is regarded as too high. The policy fails to address other costs, such as transport, uniforms, and textbooks, and this cost burden can force poor parents to keep their children at home. Proponents of a school fee policy, while disagreeing that fees solely act as a barrier to education, do concede that fees coupled with other access costs can have serious implications for learners' access to education.

The inbuilt principle in the state's funding policy has been that the higher the fees set by a school, the greater the number of parents who will be exempted – thus deterring schools from increasing their fees (Department of Education, 2003a). According to Fiske and Ladd's (2004: 72–74) investigation of school fee exemption patterns, only 2.5 % of families with children in primary schools and 4.1 % of families with children in former white schools receive fee exemptions. At secondary school level, only 3.7 % of families and 5.7 % at former white schools receive exemptions. The Plan of Action (Department of Education, 2003b) states that affluent public schools (quintile 5) will be compensated if they enroll and grant exemptions to poor learners. The purpose of the school allocations flowing to quintile 5 (the wealthier public schools) is "to make it possible and fair for these schools to enroll learners to a level where 25 % of them would be granted full exemptions from school fees." This has not been followed through in any fundamental way in the Education Laws Amendment Bill (Veriava, 2005: 10) and appears to be the primary reason for the non-enforcement of the policy on the part of many schools. However, with effect from 2012, the Department of Education has requested all schools granting school fee exemptions to poor learners complete prescribed forms so that they can be compensated the amount calculated on a set formula.

Also, there are no formal requirements that schools determine their budgets for the year by taking into account the number of exemptions likely to be granted. Consequently inequalities exist.

According to the South African Human Rights Commission (Mestry & Bisschoff, 2009: 60), the following issues concerning exemptions should also be considered since the new regulations do not make provisions for these:

- The HIV/AIDS pandemic has led to dramatic changes in the structure of families within South Africa. In all of the provinces, there are many older persons who are caring for their grandchildren, as their children have died of HIV/AIDS. This places enormous financial, social, and emotional strain in the grandparents. The regulation should provide that grandchildren under their care and who are recipients of state old-age pensions should be automatically excluded from paying school fees.
- The regulation defines income as gross salary or wages, money received from investments, and profit gained from any form of business undertaking. However, more parents in South Africa earn a living through the informal sector. A recent study released by Stats SA (2008) showed that 8.8 million people are in informal employment, 2.2 million people are employed in the informal sector, and one million people are employed as domestic workers. People who are employed in the informal sector are usually not registered businesses or are not registered to pay income tax. It is thus difficult for parents to declare their true earnings.

Exemptions in theory permit even the poor to attend affluent or fee-charging schools. There is evidence that many affluent schools fail to implement the exemption fee policy. This has serious implications for poor parents living in the catchment area where schools are situated. They are forced to pay the exorbitant school fees or send their children to schools outside their area.

No-Fee Schools

Following the publication of the Plan of Action (Department of Education, 2003b), an important immediate step was the promulgation of the Education Laws Amendment Act of 2005 (South Africa, 2005). This legislation provides the legal mandate for the Minister of Education to determine quintile norms and minimum standards for the funding of public schools. The no-fee school policy applies in principle to both primary (Grades 1–9) and secondary schooling (Grades 10–12).

According to regulation, all quintile 1 and 2 schools (representing about 40 % of schools in the country) will be declared no-fee schools. In the current policy, a fee-charging school can now apply to the provincial departments of education to be declared a no-fee school should it qualify. The no-fee schools are not allowed to charge school fees. In some provinces, the no-fee school concept has been extended to quintile 3 schools. The National Department of Education should annually publish the list of no-fee schools in a government gazette and a target table, which reflects the target per learner allocation for each of the five quintiles. The lists of no-fee schools are determined provincially by the provincial department of education using a standard national procedure. Each school is assigned a poverty score

Table 54.2 National table of targets for the school allocation (2007–2009)

Quintile	A (%)	2007 B	C (%)	B	2008 C (%)	B	2009 C (%)
NQ1	30.0	R738	100	R775	100	R807	100
NQ2	27.5	R677	100	R711	100	R740	100
NQ3	22.5	R554	100	R581	100	R605	100
NQ4	15.0	R369	67	R388	100	R404	67
NQ5	5.0	R123	22	R129	22	R134	22
Overall	100.0	R492	89	R517	89	R538	89
No-fee threshold		R554		R581		R605	

using data from the community in which the school is located (Ahmed & Sayed, 2009: 206). The school will be assigned to one of the poverty quintiles determined nationally (See Table 54.2). The middle quintile is referred to as the "adequacy benchmark." Schools in this category will receive a minimum of about R554 (equivalent to $70) per learner annum. This subsidy excludes personnel expenditure. Schools in poorer quintiles (1 and 2) are no-fee schools that receive larger allocations than those in quintiles 4 and 5 (affluent schools). Thus, no-fee schools receive more government funding and also receive compensatory funding in areas such as school safety, nutrition, classroom construction, and Grade R expansion (Wildeman, 2008: 6).

Note: Amounts in South African Rand. Amounts refer to per learner allocation for each category of school, and information is provided on the national percentages per quintile (Column A) and per learner amounts for 2007–2009 (Column B), and Column C specifies "the maximum percentage of learners in each national quintile that could be funded to the no-fee threshold level" (South Africa, 2005).

According to Table 54.2, schools falling in NQ1, NQ2, and some in NQ3 (the poorest, no-fee schools) would receive allocations of R738, R677, and R554 per learner, respectively, in 2007, and 100 % of learners would be covered in these categories. Column A represents, for example, 30 % of learners in South Africa attending quintile 1 schools and 5 % attending quintile 5 schools. NQ3 is the adequate benchmark (R554), and therefore schools falling in quintiles 4 (R369) and 5 (R123) would receive less than the benchmark.

According to Ahmed and Sayed (2009: 213), the no-fees policy fails to address many of the current challenges facing South African education. In the first instance, the policy is dependent on whether the provincial departments of education have the capacity to implement and monitor the policy. Concerns about provincial departments functioning relate to the accurate dissemination of information, communication with schools, monitoring, and administrative inefficiency. Based on media reports (Macfarlane, 2007), principals have complained of the delays in payments into the schools' banking accounts. From anecdotal evidence, many schools in the township face serious cash shortages. They are unable to purchase basic necessities for their school such as stationery or to manage their schools on a day-to-day basis. This hampers the provision of quality education in schools.

Public schools are scarce and face severe overcrowding in certain areas, forcing parents to send their children to schools in neighboring ones. By declaring only certain schools free, many poor parents will be in the situation where they cannot access these free schools and will be forced to enroll their children at middle-of-the-range schools where they must pay fees. The financial implication is that provinces in close proximity might have to deal with migration of poor learners from a poor province to a relatively rich province. The latter departments may not necessarily have factored such movement into budgetary allocations, which are based on the number of learners in that province.

School Choice

There is a trend for learners to migrate from schools in the townships to schools in the suburbs and inner city motivated by the poor quality of schools in townships. Learners travel daily from townships to attend schools in other areas and are prepared to pay the exorbitant school fees. In the same light, learners from suburbs are migrating to private or ex-Model C schools where fees are sky high to deliberately prohibit poorer children from gaining access to these schools. Many township schools had to shut down or combine with other schools in order to deal with low learner enrolment and teacher redeployment.

The complexities of the freedom to exercise choice – or the liberty principle in education finance – have serious implications for parents who are subjected to high school fee structures and are discouraged from applying for a fee exemption. Parents who want their children to receive “quality” education have no option but to abide by the school’s fee payments, otherwise their children will not be allowed to continue with their schooling in the more affluent schools. To maintain a good educational standard, these schools have to raise their school fees because the state subsidies to them are minimal. However, parents have in theory the freedom of choice within the constraints of private resources and school-level policies; in fact, government policies create markets for education within which choice behavior is exercised (Woolman & Fleisch, 2006). In the process, inequalities based on class are perpetuated as wealthier parents “buy” a better education for their children. Consequently, though dramatic positive changes have been made, many poor and rural provinces still find themselves at the lowest end of infrastructure provisioning with a continuation of gross inequalities in educational outcomes.

Learner Access and Dropout Rate

Undoubtedly, since 1994, there has been a rapid growth in school enrolment. The introduction of 10 years of compulsory schooling (South Africa, 1996: Section 3.1) has resulted in numbers peaking. The African learner enrolment increased by 16 % between 1991 and 2001. In the same period, the colored learners increased by 2 %, while the Indian and white learner enrolment decreased by 5 and 28 %, respectively. Overall, 83 % of African learners were in the public schooling system (Bot, 2005: 8). Based on the Household Survey conducted in 2006, it was established that close to 250,000 primary school-aged children and a further 280,000 learners with physical and mental challenges were not in the school system (Department of Education (2002) in Bot (2005: 8)). Poverty is the primary cause for keeping children out of school, with HIV/AIDs being a contributory factor for this bleak state of affairs. Based on projected figures, over the next decade, enrolment is most likely to decline due to HIV/AIDS, and the number of AIDS orphans is expected to rise from 200,000 to almost two million between 2010 and 2014.

In an article "Dropout rate mystery," various education labor unions in South Africa questioned the National Department of Education about the high learner dropout rate (Chuenyane, 2010). About one million learners who started their schooling 12 years ago cannot be accounted for. Over 1,444,018 learners enrolled in Grade 1 in 1998, and only 552,073 (38 %) wrote the Senior Certificate Examinations (SCE) in 2010. Of this amount only 334,718 learners (24 %) passed the SCE. However, the Director-General in the Department of National Education, Duncan Hindle, refuted the statistics provided by the unions, claiming that "there are many factors involved, including a high repetition rate in Grade 1." Hindle asserts that some of those learners that dropped out of mainstream schooling might have opted for further education and training (FET) colleges after Grade 9, or enrolled at private schools, and others might have failed a grade but were still in the system.

According to recent research undertaken by Social Surveys SA (Blaine, 2010), poverty and the generally poor quality of basic education are primary reasons behind South Africa's slow school completion and high school dropout rates. The many learners were taking more than 12 years to finish school was costly to the state and the households they lived in. At least 21.8 % of colored children, 12.8 % of Indians, 9 % of blacks, and 4.2 % of whites are not in school. The dropout rate is fairly high in Grades 10–12 (Bot, 2005). Other reasons cited for the high dropout rates include teenage pregnancies and feelings of alienation and disengagement. While the research revealed that black children were more likely to repeat a grade six times than white learners, race was a "thin film through which to view other variables – access to good quality education, living conditions and home language." However, Gardner and Crockwell (2006: 5) assert that there are many factors that impact the learners to stay and succeed in school, factors which include economic hardships, family challenges, different forms of social discrimination, peer challenges, interpersonal conflict, and lack of classroom supports. In a South African context, the socioeconomic status of parents still remains the primary reason for the high dropout. The low promotion requirements for learners to progress from one grade to another have resulted in the promotion of learners who cannot cope with the curriculum, resulting in a bottleneck especially in Grades 10 and 11, and therefore a sharp drop in Grade 12 enrolment. Overage learners have been removed from the schooling system and the option these learners have obtaining the SCE as private candidates or enrolling at FET colleges. What is most disturbing is the sharp drop from 101 to 67 % in the Grades 11–12 ratio for the same period. Bot is of the opinion that there may be evidence that schools and districts engage in gatekeeping or culling of Grade 11 learners.

Resource Allocation and Educational Outcomes

Adequate school funding secures essential resources for the provision of quality education. The relationship between the resources used to provide education and the resulting outcomes for learners is treated as analogous to a general production function in economics, in which inputs (factors of production) are related to outputs. The education production function focuses on the relationship between resource inputs and learner outcomes, largely ignoring the complexity of the family and school processes that intervene and are largely responsible for reproducing inequalities in the system. Levacic and Vignoles, (2002: 1) suggest that if robust evidence on school production function relationships were more widely available, decisions concerning the adequacy, efficiency, and equity of school resource allocations would be much more soundly based:

- Education economists have different views on whether there are causal links between resources and educational outcomes, but Levacic (2004) asserts that there is one between resourcing and learner outcomes: Changes in class size in the primary school from 40 to 50 may have a significant effect on teaching, learning, and outcomes.
- Conditions of classrooms (leaking and unusable classrooms) have a strong effect on reading and mathematics scores for middle school learners.
- Providing textbooks increased primary learners' attainment quite substantially.

In our rural and peri-urban societies, most schools are poorly resourced and thereby engendering a poor quality education.

In South Africa, research conducted by Van der Berg (2006: 60) reveals that despite shifts in real resources, educational outcomes hardly improved in former black schools – although admittedly, some more affluent black learners moved to historically white schools, which maintained their results over the period. Despite additional resources channeled into school education and the more equitable distribution of such resources, the aggregate number of successful candidates increased only moderately in the decade after the transition to democracy. Increase in pass rates was initially driven by a reduction in the number of candidates through restrictions on overage learners in the school system. Analysis of the 2003 matriculation results further illustrates the situation of racial educational differences in educational outcomes. In 2003, white learners who passed matric in public schools constituted 69 %, whereas for black learners this figure was only 28 %. One in ten of the white cohort achieved an A-aggregate, whereas scarcely one in a thousand of the black cohort managed this. Moreover, barely half of the black learners achieving this distinction came from former black schools. Thus, we see inequalities in school performance being replicated.

While it is true that fiscal resource inputs are no guarantee of desired educational outcomes, they do have some effect on the educational outcomes. According to Van der Berg (2007: 851), equity of educational outcomes requires both well-targeted fiscal expenditure and efficient schools. On the one hand, fiscal resources do not necessarily translate into scarce real resources (qualified teachers and school management)

Table 54.3 Gauteng senior certificate examination results, 2004–2006

Quintile	Average funding per school	No. of schools	Below 40 %	41–50 %	51–60 %	61–70 %	Above 70 %
2004							
1	R480 444	57	8	4	13	10	22
			14 %	7 %	22 %	18 %	39 %
2	R367 431	74	9	9	8	16	32
			12 %	12 %	11 %	22 %	43 %
3	R286 559	110	13	18	19	20	40
			12 %	16 %	17 %	18 %	37 %
4	R194 002	105	4	2	8	9	82
			4 %	2 %	8 %	8 %	78 %
5	R62 632	116	0	0	0	2	114
						2 %	98 %
2005							
1	R532 054	57	11	9	12	8	17
			19 %	16 %	21 %	14 %	30 %
2	R410 225	74	11	16	8	19	20
			15 %	21 %	11 %	26 %	27 %
3	R318 319	110	18	14	19	23	36
			16 %	13 %	17 %	21 %	33 %
4	R207 813	105	5	4	7	19	70
			5 %	4 %	7 %	18 %	66 %
5	R70 414	116	0	0	0	2	114
						2 %	98 %
2006							
1	R539 477	57	10	9	6	9	23
			17 %	16 %	11 %	16 %	40 %
2	R414 993	74	6	10	7	12	39
			8 %	14 %	9 %	16 %	53 %
3	R326 905	110	11	13	16	16	54
			10 %	11 %	15 %	15 %	49 %
4	R217 906	105	2	5	6	9	83
			2 %	5 %	5 %	9 %	79 %
5	R73 886	116	0	0	0	1	115
						1 %	99 %

Source: Data supplied by the Gauteng Department of Education

required to improve school performance. Good teachers are scarce and it is difficult to entice them to work in townships or rural schools, where there most needed. Secondly, even where resources are available, their effective utilization is not guaranteed.

Table 54.3 (below) illustrates uneven school performance from 2004 to 2006. The pass rate of Gauteng schools is classified into quintiles. Similar data sets from the Department of National Education and some provincial education departments are not available. It is evident that there is very little improvement in pass rates in black schools, despite large resource shifts. While the pass rates in affluent schools were almost uniformly high, predominantly black schools performed abysmally, with most reaching pass rates in the range of 20–60 % or even lower. Even though many former white and Indian schools accommodate black learners, the matriculation pass rate is still consistently high. Thus, we note that inequalities at the matric level are more accentuated in a system that purports to be just and equitable.

Drawing on international and national research, we concur with the findings that resource increases alone do not improve the matriculation results and therefore impede social justice and equity. The role of socioeconomic status (SES) and other factors, such as dropouts, transitions between grades, and quality of educational performance up to matriculation level, are some factors that determine the matriculation results. We, however, believe that resources (human, physical, and financial resources) contribute significantly to the provision of quality education and social justice.

Conclusion and Recommendation

Although the South African government has taken numerous strides in enhancing equity, redress, and social justice in education, there have been a number of challenges in the implementation of policies which have affected the process of bringing about fundamental changes and transformation in education. Inequalities based on race and socioeconomic status in particular continue to be reproduced in a system that is only superficially egalitarian and democratic. Although progress has been made towards a just distribution of public funds through the NNSSF, "no-fee" schools, and school fee exemptions, significant inequalities persist, attributed largely to the social legacy of apartheid and new emerging discourses. It is unclear to what extent funding has translated into actual resource inputs and gains for the poor, but it would appear that there is a strong correlation between funding and educational outcomes. Most affluent schools achieve excellent matriculation results because, among others, they have more physical resources than poor schools and employ more teachers than are allocated by the education departments.

Although the NNSSF and other related funding policies address social justice and equity issues, the implementation of these policies is a major concern: large and overcrowded classrooms still exist, township learners migrate in large numbers to inner-city and suburban schools, high school fees, poor teacher training, ineffective management of school finances, lack of leadership from SGBs, SMTs and Districts, and the inaccessibility of poor learners to affluent schools.

Based on this discussion, it is evident that while the state is making a concerted effort to address social justice and equity in public schooling, educational outcomes and learner achievement still leaves much to be desired. I propose that the funding model be reviewed to consider important but deeply neglected aspects in education:

- The quintile system of public school funding should be abandoned. Even though it has been reported in the media that the state intends abolishing the quintile system, nothing has been forthcoming. The criteria for ranking schools into quintiles are seriously flawed. For example, even though a school is situated in an affluent area, it may cater for over 90 % of learners from outside its feeder area. This school is ranked as quintile 5 and receives the lowest funding on the scale, yet caters mainly for middle-class and poor learners. The school is placed in a diabolical situation: They raise school fees and then adopt a hard-line approach to grant exemptions to learners who have difficulty in paying these exorbitant fees. Similarly, learners from affluent circumstances may attend no-fee schools without making any monetary contribution to schools.

- The funding policy should seriously consider the adage that "funding should follow the learner" similar to the voucher system applied in the USA.
- The application for state funding should not be prescriptive. The funding set aside for resource allocation to public schools by provincial departments should not be ring fenced. For example, the Gauteng province prescribes that schools should spend 50 % on LTSM and 50 % on services and school maintenance. SGBs should spend the funds on educational matters they deem necessary for their schools or to employ additional teachers and pay from these funds. However, the SGBs would still remain accountable for the application of funds to the Head of Education.

Therefore, it is challenged that school funding policies should be based on comprehensive analyses of the contextual situation in our urban, rural, and poor schools, so that those who should benefit from funding do actually get the benefits of our young democratic dispensation.

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Part VII
Leadership Preparation as Intervention

Chapter 55
Clarifying Conceptual Foundations for Social Justice in Education

Susan B. Feldman and Kersti Tyson

In the United States, we hold the truth that public education equalizes individuals' opportunities to participate effectively in our capitalist democracy to be self-evident, and yet we have not demonstrated this to be true. Instead, the social disparities in the social world outside of schools permeate the social world inside of schools. As a system of educators and infrastructures, public education has not succeeded in securing equal access to high-quality learning experiences for all students. The 2001 passage of the federal Elementary and Secondary Education Act (ESEA, commonly referred to as No Child Left Behind) shifted the expectation from school systems to provide equal opportunity for all students to have an education, to school systems producing equal educational outcomes for all their students. Taken in its best light, this policy change was intended to create pressure on the system to comply with the expectation that schools should provide equal access to high-quality instruction for all of their students.

This shift has had noticeable impact on the work of school leaders and, therefore, the preparation of school leaders. For example, New York City has developed a leadership academy to prepare leaders to lead schools through the "turn around" from simply offering the opportunity to learn, to schools that can generate high academic achievements for all of their students. Atlanta, Georgia, St. Louis, Missouri, and the whole state of Massachusetts have created similar leadership preparation programs to teach leaders particular strategies to lead equity-focused

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learning agendas. Each of these programs frames the problem of how to "improve" the educational outcomes in schools differently, and each of these programs and school leadership preparation programs, generally, establish their own set of approaches to preparing leaders that tend to serve the interests of the school districts where their graduates find jobs.

Despite the blossoming of a few new leadership development innovations, leadership preparation programs, new and long established, lack clear theoretical foundations that explain school leaders as pivotal social justice workers. In fact, we do not yet know what the leadership strategies are for generating high academic achievement outcomes for all students. We know more now than we knew in 2001, but we have few to no examples to follow given that very few schools have accomplished the goal of equal educational outcomes for all students. The persistent challenges at the core of school leadership continue to be problems of equity, equality, and social justice. We assert that school leaders continue to be woefully underprepared to negotiate these problems.

Despite good intentions, it is rare to find fully developed theories and practices of social justice guiding school leadership preparation programs. We submit that this is less because professors of school administration are unconcerned with this issue and more because of the formidable challenge of developing a program-wide theory of action for enacting social justice in education. Not only are the faculty unlikely to agree on what the role of school leadership is or ought to be in producing social justice, but no less consequential is the fact that there are few local proofs to learn from.

Despite school leaders' intentional dedication to leading a school with a clear, equitable learning agenda and a commonly professed commitment to school as the social institution intended to equalize otherwise unequal social conditions, their aims fall short. In response to these observations, we propose that unless school leaders develop a coherent conceptualization of social justice, they will be unlikely to fashion their leadership accordingly. Designing context responsive leadership preparation is challenging. The solutions to academic injustice in one school or district may or may not apply to another. There is not one set of skills or knowledge that will work across all contexts. It is not easy to know which of the multiple theories of social justice is useful for preparing leaders in education (Griffiths, 2003). It is not a surprise, then, that school leaders might lack a coherent vision of social justice in education when most school leadership preparation programs lack a coherent theory of action for social justice in education.

Educational leaders develop their thinking about these matters across a career, and there are many influences on their thinking. Their first formal exposure to these ideas about their practice—in formal programs that prepare them for administrative positions—is likely to exert an especially powerful influence on their initial images of what it means to lead for socially just purposes and how to realize these images of leadership. Our goal here is to delineate a conceptual framework for school leadership preparation programs to clarify their own comprehensive and coherent programmatic approaches to preparing school leaders who will transform schools and school systems into institutions that promote social justice. To contextualize the necessity for school leaders to be well prepared to address issues of social justice in their schools and districts, we present two scenarios taken from actual school practice.

Scenarios

The scenarios below are developed from everyday real problems of practice in schools in the United States after the federal reauthorization of Elementary and Secondary Education Act (ESEA) of 2001. This federal policy required state-level development and implementation of standardized academic expectations that would be tested each year in grades 3–10 and test scores for each school be reported publicly. This created significant pressure in schools and school districts, making it clear to the public that some students attend schools that do not prepare them equitably. Public reporting of school academic achievement data starkly exposed the fallacy that public schools were equalizing students' opportunities to succeed in our capitalist democracy.

By 2005, many schools were exposed as failing to produce adequate learning outcomes, particularly for economically poor students. The new measures of student achievement produced the "achievement gap," "education debt," or "opportunity gap" (Ladson-Billings, 2006). These terms describe the persistent inequity in educational outcomes throughout the US school system. The new measures were not exposing new problems but transforming long-standing inequity into an urgent topic of concern for school leaders who were being held accountable, for the first time, for the education of all of their students. Once exposed, school leaders were expected to eliminate the academic disparity in their schools. These new accountability pressures created new needs and expectations for school leadership programs.

This is the policy context of the two scenarios below. Each illustrates the dynamic and multifaceted conditions of in/justice in schools expected to produce equal opportunities for all students to learn and equitable academic outcomes that would provide authentic opportunity to successfully participate in the capitalist economy. Like the real-life situations school leaders face each day, these scenarios can be understood from multiple and conflicting perspectives. We take up four of those perspectives following the presentation of the scenarios.

What the Data Display in a District[1] with an Apparent Achievement Gap

> Disaggregated standardized test score data have made it clear that there is an achievement gap that cuts across race and class in every school in the district. A group of teachers from one of the district's two high schools wants to close the achievement gap in their school. They approach their school leader, the principal, for support. He gives them money and time to attend a workshop entitled "Strategies for working with students from poverty." The principal is hoping they find the answers they are looking for. The teachers return from the conference with new ideas and language and a new appreciation for the magnitude of the problem and the complexity of closing the achievement gap. They see clearly that deficit

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[1] For more information on the structure of US k-12 school system see: http://usinfo.org/enus/education/edu_overview.html

> model thinking, and victim blaming, is common throughout their school and school district. They had heard the principal justify the low achievement of economically poor students in the high school as "a problem with our cliental." They are fully aware of the tracking system controlled by the school councilors that place economically advantaged students in "college bound courses" because "those students were more likely to go to college."
>
> How could this small group of teacher leaders, just learning to see the complexity of injustice in their school make a difference? They first went to their teachers' union for support. They wanted to start by gaining the support of the principal but were not confident that they could explain their emerging perspective to the principal without jeopardizing their standing. There was nothing in the union process that could support teachers confronting a principal's inequitable leadership. In fact, they found that inequitable opportunity was normal practice throughout the district and the union leaders did not see it as a problem.
>
> The teachers next approached the district's leader, the superintendent, with the request to lead a district-wide task force to begin to study the achievement gap in the district more closely and to design a district-wide solution. The superintendent didn't return the teachers' letters or e-mails.
>
> The teachers began to complain in the hallways and staff rooms across the district that the district was expecting teachers to close the achievement gap while providing no direction, vision, or practices to lead the work. In an effort to pressure the central office administrators, a group of teachers contacted parents on the high school's academic excellence committee and asked them to attend school-board meetings in order to raise questions about the district's strategic plan to close the achievement gap. When these concerns showed up in the newspaper after the board meeting, these parents found themselves swamped with calls from other parents interested in getting involved.
>
> Next, the high school teacher's group formed an equity committee on their own, and they invited students, leaders, and central office leaders to join them. One principal in training and two out of 23 leaders showed up for the first meeting, but no central office administrators. The two leaders who did show up were in the process of planning a district-wide meeting for all of the school leaders. They invited this new committee to organize a one-day, anti-oppression training as part of this meeting.
>
> At the close of this one-day meeting, the superintendent was moved to tears. He explained that his tears were caused by his realization that he had been leading school districts for more than 25 years without knowing his own biases and that he could now see how he had blamed others for what was within his control to change yet, he confided, he had no concrete strategy for change.

This scenario highlights a process by which a diverse group of people might collectively lead the work of transforming schools into institutions where education is a tool that promotes social justice. Yet, in the scenario, the positional leaders were the least prepared to inform this work. These leaders have a unique responsibility for leading this work, but they have to be taught to lead it. Clearly, position alone will not create the necessary conditions for transforming schools into institutions that promote social justice. Leaders need to know and be able to do more. Hence, a central problem and opportunity for educational systems reside in the ways that educational leaders come to understand their work, develop images of possibility, and become competent in attaining those visions. This scenario hints at the lack of learning opportunities, both formal and informal, for the superintendent and his colleagues and district and school leaders to develop more specific ideas of a more socially just school system and how to work toward such an ideal.

Let's now turn to a scenario for a developing leader who is a principal in training in a middle school in the same district. He participated in the anti-oppression training then returned to his preparation program with a strong interest in learning how to lead for social justice in his future schools.

> When the principal intern returned to his weekly principal-preparation classes at his university preparation program, he shared with his colleagues what had transpired at the anti-oppression training. His peers had a variety of responses to his story. A small group believed the superintendent should quit and let someone who knew how to do the work take the job. Some students were moved by the superintendent's learning and willingness to continue to learn about this area of school district leadership; others thought the issue was overemphasized and not really the work of a superintendent; and still others thought the superintendent should hire a person of color to come in and do ongoing diversity training for the whole district. Students saw their various perspectives as being in conflict with each other. They turned to their university faculty to resolve the conflict.
>
> This experience created a conflict that students wanted the faculty to respond to and resolve for them over the course of their program. All of the students understood that the program's core values were grounded in social justice. What was now clear was that each group of students had its own ideas about what this meant and what it might look like in the program coursework. Each group now had an interest in the program moving in the direction of its point of view. Interestingly, the faculty were themselves conflicted about how to address the question of how to prepare school leaders to work for social justice in their settings.

Leadership preparation programs with unclear or under-conceptualized definitions of social justice may lack the necessary foundation to guide program design and instruction.

These programs are places where foundational ideas about leadership are formed. While leadership may be learned over the course of a career, a comprehensive understanding of the interaction between social justice and education practices may best be established in preparation programs. School leadership as social justice work may be antithetical to current leadership practice and may, in some contexts, be considered poor leadership. Without a coherent and comprehensive understanding of social justice in education and associated knowledge and skills, aspiring leaders may be left confused and underprepared for their work.

While there are many steps in any educational leader's learning process, a first and important occasion for such learning resides in the formal programs that prepare individuals to assume credentialed administrative positions. We assert that aspiring school leaders who learn, in their leadership preparation program, that social justice is the centerpiece of their job are more likely to see and address the constant injustice in schools. Formal school leadership programs have the advantage of designing and enacting intentional learning experiences with willing participants. Learning experiences of this kind offer the chance for aspiring leaders to begin to grasp the complexity of social justice as a central problem of practice, as hinted at in these scenarios. While the formal preparation of leaders may not offer everything a leader will need to understand, explain, describe, and advocate for, this phase of leadership development can lay essential groundwork for a career-long pursuit of just educational practice.

Keeping in mind these scenarios, the next section presents four distinct theories of action for school leadership as the work of social justice. Each theory of action proposes particular and distinctive ways to understand and address injustice in education. Although there are more theories available, we chose four that have wide currency, each with a well-established literature and history in practice. This is not intended to be an exhaustive description of each of the theories but rather an attempt to highlight four central constructs that model how the deconstruction of theories for education to realize social justice goals can be useful for leadership program planning.

The four theories for promoting social justice through education are:

A. *Antibias education*—a developmental approach to social justice rooted in racial identity development theory and progressive, grassroots practices of education as activism for social change
B. *Critical pedagogy*—an empowerment approach to social justice concerned first with emancipatory education of the oppressed through critically questioning the contradictions in the immediate reality of schooling
C. *Multicultural education*—an intellectual approach to social justice rooted in expanding the production and dissemination of knowledge to include all groups in society
D. *Whiteness studies*—a decentering/deconstructing whiteness approach to social justice rooted in the understanding of race as a social construction that produces the system of advantage based on race and locates racism as a white problem to be solved by whites in education

Preparing School Leaders to Work for Social Justice in Their Schools

For our purposes here, we frame school leadership for social justice as the leaders' prioritization of the high academic achievement and educational success of students who have historically been marginalized and underserved in the school system (Ford, 2011). By prioritizing the educational success of these students, the institutionalized, routine practices of injustice, and particular locally situated injustices, become apparent obstacles to be eliminated and areas to be transformed.

The research on school leadership for social justice elaborates an array of challenges for preparing school leaders to work for the form of social justice defined above. Three prominent challenges are highlighted here. First, deficit model thinking (Skrla & Scheurich, 2001) and victim blaming (Ryan, 1976) hold routine injustices in place. They propose the students and/or their families are the reason the school does not succeed. Conceptualized this way, the non-achieving students arrive at school each day somehow deficient, and therefore their unequal accomplishments are their own fault. Put overly crudely, these conceptions relinquish educators and school leaders from the responsibility of providing conditions for high academic achievement, because the problem is defined out of school (Howard, 1999; Gay & Howard, 2000).

Second, schools suffer from institutional racism that is both historical-structural and perpetuated interpersonally (e.g., Griffiths, 2003; Orfield & Eaton, 1996; Hale, 1982; Hooks, 1994; Ladson-Billings, 1994). Here low academic achievement is recognized as a problem inside the school, but beyond the scope of an individual school leader to effect.

Third, school leaders are poorly positioned to advocate for deconstructing the barriers to social justice because they have benefited from the system of advantages those barriers protect, as have their board members, and their peers in their clubs and committees (e.g., Bell, 1987; Kivel, 2002; Spring, 2000; Tyack & Hansot, 1982).

We submit that school leaders, and particularly leaders, for the first time in the history of school leadership (Tyack & Hansot, 1982) are in the position to advocate for the social justice goals described above (Foster, 1997). Currently, leaders are held accountable for running schools that generate high academic achievement across all student populations, which requires that all students have access to high-quality learning experiences. It is widely accepted that schools, as they have been run in the past, are "failing" to produce the learning outcomes expected and are being "restructured" to meet expectations that, though not generally stated as such, align with the social justice goals stated here. In other words, unlike in the past when the principal's job was to maintain traditions and to keep the school running smoothly, the principal's job now is to find and eliminate obstacles that cause some students to struggle to learn in the school. Leaders are to "turn around" the school and restructure the learning environment, the learning experiences, and the learning outcomes to keep their jobs (Portin et al., 2009). These job changes require changes in school leadership preparation. We submit that a primary obstacle to schools realizing their role as a tool for social justice is the lack of leadership preparation for this social justice work. Without explicit training, school leaders cannot and will not advocate for the complex changes required of them.

For leadership preparation programs to train leaders to restructure their schools to ensure the high academic achievements of students who have historically been underserved by the school, school district, and school system, they require the faculty time and attention to clarify the ways systems of advantage work through schools. These conversations among faculty members can be challenging, often engaging multiple conflicting perspectives, which can make faculty meetings contentious (e.g., Cochran-Smith et al., 1999; Berlak and Moyenda, 2001; Dilg, 1999). As was illustrated in the second scenario, students also bring conflicting perspectives and expectations to the preparation program, which can cause contentious learning environments. Another complicating factor is that leadership preparation programs may not have faculty members whose disciplinary training is in the field of social justice, making expertise a problem. The content of social justice (e.g., Rousseau, 1968; Arendt, 1981; Foucault, 1977; Rawls, 2003; Solomon, 1990; Waltzer, 1994) is often left up to well-intentioned faculty members to sort out for themselves with little help to think carefully about how their coursework relates to preparing school leaders to run schools that prioritize the academic success of the unsuccessful students. Even under the new accountability expectations for school leaders, there is tension between old and new leadership models. For example, in the current model, most candidates complete an internship with a principal mentor who defines the candidate's "fit" for the job. Candidates for school leadership with an interest in shifting or dismantling the system of advantage in the school can easily be seen as "unfit" for the job. Leadership preparation programs must also prepare leaders to think beyond the current conditions of schooling to the desired future of education. Preparing school leaders to run schools that provide for the academic success of *all* students by prioritizing the high academic achievement of unsuccessful students is an enormous task, and there are few local proofs that it can be accomplished, which is why this chapter is proposing theoretical approaches to this work. The four theories below offer four distinctive approaches to preparing school leaders for this work. These theories were largely crafted with teachers in mind, and we have extended them for application to and even further to the preparation of school leaders.

Four Theoretical Frameworks

In the growing literature on teaching social justice in leadership preparation (e.g., Brown, 2004a, 2004b; Capper, 1998; Marshall & Olivia, 2006; McKenzie & Scheurich, 2004; Shields, 2004; Skrla & Scheurich, 2001), most common are activities to include in courses, strategies for activities or for courses, ideas that might be taught in courses, and models for courses (e.g., Adams, Bell, & Griffin, 1997; Derman-Sparks, 1989; Derman-Sparks & Brunson-Phillips, 1997; Katz 1978; Marshall & Olivia, 2006; Tatum, 1994).

While all these activities are important and a part of the work of leadership preparation, what seems to be missing, and what we hope to encourage, are program-wide designs linked to explicit theories of education for social justice that inform instructional decisions in school-leadership preparation programs. Linking program activities, strategies, and practices to theory provides a backbone for conceptualizing and doing the work of preparing leaders to meet the accountability expectations and realizing their potential to enact social justice in schools and districts. There are many scholars who contribute to the work that we are only briefly summarizing here. Our goal is not to present a literature review for these theories or an exhaustive explanation of each theory but instead to illustrate how, by creating four central constructs from each of these four distinctive theories, it is possible to see how each theory suggests a particular approach to leadership preparation and can be a basis for program design.

Each of the theories presented below, while grounded in the same hopes for education to be a tool to realize social justice, posits a different set of ideas about how to accomplish the goal. Each theory suggests a different explanation of the role of education in promoting social justice, a different definition of social justice, and a particular theory of action for school leadership, all of which suggest particular implications for leadership preparation. Taken together, these distinctive constructs pose a different set of considerations for how to prepare leaders to lead schools that embrace and enact one or more of these theories in practice.

Framing the theories this way creates a tool for the faculty to organize and analyze personal and programmatic responses to program policy, practice, and interactions

Table 55.1 Elements of conceptual framework

Elements	Descriptions
Definition of social justice	Describes what social justice looks like through the lens of the theory
Role of education in promoting social justice	Describes the way education is or can be central to realizing social justice
Theory of action for school leadership	Describes the underlying conceptions, within the theory, that can inform strategic and intentional leadership action in schools
Implications for leadership preparation	Describes the pedagogical practices suggested by the theory of action

as well as providing lenses for making programmatic and instructional decisions. When there are competing interests about what to teach, when to teach it, and how to teach it, the framework can guide decision-making with the question, of all of our choices of action, which best enacts our theory of action for preparing these school leaders to prioritize and ensure the academic success of their historically marginalized and underserved students?

Construct Framework for Leadership Preparation

The construct framework begins with the definition of social justice; this describes what social justice means through the lens of this theory. The second construct is the role of education; this explains the way public education is or can be central to realizing social justice. The third construct, "theory of action for school leadership," describes the underlying conceptions within the theory that can inform strategic and intentional leadership action in education, and the fourth construct, "implications for leadership preparation practice," describes the pedagogical practices suggested by the theory of action. While this doesn't tell the reader everything there is to know about each theory, it presents core constructs necessary to see key features of the theories and to consider the various possibilities each theory offers for guiding leadership preparation programs (Table 55.1).

We are not advocating one or another of the theories below, nor are they presented in any particular order; instead, we are modeling how a program planning group might take a set of compelling or popular theories for social justice in education and analyze their core features to consider their programmatic possibilities.

A. Antibias Education

The foundation of antibias education is generally attributed to Louise Derman-Sparks (1989). Antibias education combines racial identity development theory (e.g., Carter, 1997; Cross, 2003; Helms, 1989; Phinney & Rotheram, 1987; Tatum, 1994,

1997) with critical pedagogy (e.g., Freire, 1985, 2000, 2001; McLaren & Kanpol, 1995; Nieto, 2003; Trifonas, 2003) and progressive grassroots activism. From the perspective of antibias education, schools are considered inherently unjust, and a school leader's job requires establishing the ongoing process of challenging, intervening, and actively countering personal and institutional behaviors that perpetuate oppression (Derman-Sparks, 1989).

Antibias education rests on a theoretical foundation of racial identity development theory that proposes the more one's racial identity develops, the more effectively one can work as an anti-oppression activist. Race is centralized in antibias work because race is understood as a social construct at the intersection of multiple systems of advantage (e.g., class, gender, ability). For example, when racial identity is called into crisis, it necessarily stimulates considerations of class, gender, and ability identities, which are also socially constructed through systems of advantage.

From an antibias perspective, social justice is defined as the activity of individuals with sufficient racial identity maturation to stand up for fairness and interrupt the system of advantage based on race. This capacity to stand up for fairness is achieved through education. There are four components to an antibias education. First, learn to interrogate your own location in the system of advantage based on race; second, learn to understand multiple perspectives. This includes learning to recognize the boundaries of one's own cultural encapsulation and decentering whiteness as the "normal" or dominant perspective. Third, teach critical thinking. Among other things, critical thinking enables school leaders to question who is benefiting from current practice and whose perspective is missing from the account of the situation. Fourth, learn to stand up for fairness through identity development where one comes to know one's self as an antiracist activist. Identity development occurs through a crisis-resolution process that progresses through predictable stages. Antibias education generates an identity crisis in order to encourage development.

Aspiring leaders' (students of an antibias education, generally) responses to an antibias education are fairly predictable and help the faculty assess student development and tailor learning experiences to students' particular developmental needs (e.g., Helm's stages of racial identity development: contact, disintegration, reintegration, pseudo-independence, immersion-emersion, and autonomy). According to these staged theories, the most mature stage is to know oneself as an antiracist activist. School leaders need to develop through all the stages of anti-oppression identity to understand the full spectrum of expression that oppression produces. A mature racial identity results in the leaders' ability to build coalitions across groups with significant differences to stand up for fairness.

Antibias theory offers a useful explanation for why it is emotionally charged to teach and learn about race (or class or gender) in education. Racism is not simply a historic condition; it is a personal orientation where every individual is implicated. Antibias education recognizes that teaching and learning about injustice puts people's identities at stake. This theory can help the faculty plan instruction that anticipates stimulating and resolving students' identity crises as an inherent part of the learning process. Identity development is caused by discomfort and the resolution of that discomfort through greater understanding of oneself and the social and political

Table 55.2 Antibias education

Elements	Descriptions
Definition of social justice	When racially mature individuals act individually and collectively to stand up for fairness. Fully developed individuals empowered to disrupt oppression through individual direct action and collaborative grassroots organizing in social settings including schools.
Role of education in social justice	Antibias education includes four essential components: (1) know yourself, (2) know others, (3) critical thinking, and (4) stand up for fairness and identify and interrupt unfair action.
Theory of action for school leadership	Stimulate and encourage racial identity development for the teaching staff and students through constructed interactions that cause identity crisis and re-equilibration toward a mature anti-oppression identity. Enact norms of anti-oppression activism that expect the four components of an antibias education to be central to classroom instructional designs, staff interactions, and the overall goals of the school community.
Implications for leadership preparation instruction	Learning caused by the careful construction of discomfort and its resolution. Identity development follows a developmental continuum of intra-/interpersonal psychological processes that lead to anti-oppression activism. Enactment requires that leaders have fully developed racial identities. The graduate school leaders need to understand the theory and practice of the program and fully support it when students complain about the discomfort of identity crisis. Internships must be reconceived. The faculty must be highly skilled in facilitating socially constructive conflict engagement.

conditions that inform personal identities. Therefore, program faculty need to teach from a mature racial identity in order to construct and navigate the disruptive interactions that emerge in antibias environments. A leadership preparation program could set completion standards based on students' demonstrations of progress through recognizable developmental stages, culminating in a demonstration of effectively standing up for fairness in their school setting (Table 55.2).

In summary, antibias education proposes that while injustice is both historical and structural, individuals maintain systems of advantage based on race. To realize the goal of leadership for social justice, prioritizing the high academic achievement of students who the school has historically failed , the theory of leadership action is to disrupt the school's systems of advantage based on race, which are likely to be normalized and deeply embedded in all practices in the school. Leadership will require racial identity development, informed by the interrogation of the leader's own location in the system of advantage based on race, continuous consideration of perspectives different from the leader's own, critical thinking, and actively and publicly standing up for fairness.

B. Critical Pedagogy

Paulo Freire (1985, 2000, 2001) is generally credited as the original thinker for critical pedagogy, but the roots of this work are traced to Marx and Engel's writings on social reform (Bowles & Gintis, 1976). Critical pedagogy is based on critical social theory and conceptualizes teaching and learning as a form of social activism. To teach is to expose the inherent contradictions in the immediate social circumstances of the learners, and to learn is to be empowered and emancipated from previous unexposed tendencies of social reproduction that strives to consolidate power and resources with those who already have it. Central constructs underlying critical pedagogy include (a) recognition of power as a constant factor in the social and political context that constructs and constricts thought and experience, (b) inquiry into inherent contradictions in immediate experience that generates empowerment and emancipatory practice, and (c) dialectical materialism that ties the sociohistorical past to the present social conditions of education (e.g., Apple & Beane, 1995; Darder, Torres & Baltodano, 2003; Freire, 1985, 2000, 2001; Giroux, 2001; McLaren & Kanpol, 1995; Shor, 1992; Shor & Freire, 1987).

Critical pedagogy is primarily interested in the education of the oppressed. Taken to the extreme, this includes all students under compulsory attendance conditions, which alienate them from their own choices and learning interests (e.g., Aronowitz, 2004; Mayo, 1999). Social justice is realized in schools that disrupt the social reproduction of injustice and enable emancipatory education of students who have historically been marginalized. Critical pedagogy is a practice of teaching and learning, which may be formal or informal, that recognizes the power structures in knowledge, social organizations, personal relationships, and the immediate experiences in the learning environment as a laboratory for learning to redistribute power to benefit the oppressed whose emancipation comes through understanding the sociohistorical conditions that led to the current conditions of oppression.

From this theoretical perspective, school is the location of a consequential struggle between social reproduction and the emancipatory interests of students who have been historically marginalized by schooling. The definition of social justice is the ongoing struggle to redistribute power and resources in the interest of the oppressed. Social justice is not an achievable state; it is instead a continuous dynamic practice of finding, interrupting, and redistributing power. Unlike antibias education, in which social justice is manifested through mass identity maturation that changes the way people feel toward and interact with each other, from a critical pedagogy perspective, social justice is manifested in the continuous struggle to redistribute material resources and tangible power.

Critical pedagogy suggests a social change theory of action for school leaders. Unlike most theories of action for school leadership that locate the leader as the highest positional authority in the school, expected to maintain the traditions of power and resource distribution, the theory of action for critical pedagogy is for school leaders to analyze and problematize the immediate experience of education by exposing the inherent complexities and contradictions within the schooling

Table 55.3 Critical pedagogy

Elements	Descriptions
Definition of social justice	The ongoing struggle to redistribute power in the interest of the oppressed.
Role of education in social justice	Learning to live in the struggle between the interests of social reproduction and emancipatory interests, which are constantly being redefined.
Theory of leadership action	Leaders assume oppression as the tendency of schooling and vigilantly disrupts the social reproduction of injustice that schools tend toward through the active redistribution of power and resources and the continuous interrogation of the inherent contradictions in the immediate learning environment.
Implications for leadership preparation	Critical pedagogy is primarily concerned with the education of the oppressed. Unlike dominant educational practices that marginalize poor and minority students, critical pedagogy places their education for their emancipatory interests at the center of the schools interests.

experience. Once exposed, the social and political context of the immediate reality of the K-12 school system becomes the site for social change. The school leader assumes oppression as the tendency of schooling and vigilantly disrupts the social reproduction of injustice that schools tend toward. Critical pedagogy is likely to call the very nature of compulsory education into question, and students could be expected to question authority and make choices that reflect their own learning interests. Aspiring leaders might be expected to link their own actions to articulate theories of power and to demonstrate how their leadership actions redistribute power to benefit others.

Critical pedagogy has proven largely successful for students and teachers around the world. While it aligns with leadership for social justice as the prioritization of the success of underserved students, it poses potential problems for leadership preparation. With its central concern for the education of the oppressed, it recognizes the oppressive and socially reproducing nature of schooling in its current form and plans for the deconstruction of the very system the developing leaders are trying to enter. This tension immediately calls into question issues of power and privilege of the aspiring leaders in the preparation program. Critical pedagogy locates school leadership preparation in a constant struggle to use the system in order to dismantle the system. Leaders' preparation might focus on what they need to know to live in this struggle and to use their power and privilege to the advantage and emancipatory interests of oppressed groups in their school community (Table 55.3).

In summary, the theory of leadership action, from a critical pedagogy perspective, is to redistribute power in order to prioritize the high academic achievement of students who have not yet been well served by the school, the school district, or the school system. This generates a constant struggle for the school leader between the pressures of social reproduction, which undermine the emancipatory interests of underserved and historically marginalized students, and the school community members who have benefited from this social arrangement.

C. Multicultural Education

Dr. James Banks and Cheery Banks (e.g., 1995), Dr. James Banks (e.g., 1993, 1994, 1997, 1998), Christine Sleeter (e.g., 1996), Carl Grant (e.g., 1992), and Geneva Gay (e.g., 1994) are five foundational authors of multicultural education. Underlying multicultural education is the idea of social transformation through cognition. Multicultural education recognizes that knowledge is never socially or politically neutral. Multicultural education's central premise is people who control the production and dissemination of knowledge influence what is considered valuable to know. People are changed by what they know. Social justice requires the expansion of the production of knowledge to all groups in society for all groups in society (Banks, 2002). Social justice is realized when all people participate in the construction of knowledge and diverse contributions to the body of knowledge are recognized, not for conformity with dominant and popular thought, but for divergence and innovation (Hill-Collins & Anderson, 1998).

The role of education is to produce meaningful knowledge and to understand the social and political implications of knowledge and knowledge production. The theory of action for school leadership is to ensure the inclusion and dissemination of empowering and relevant knowledge and to ensure curriculum and instructional practices do not offer privilege of one group's knowledge (i.e., the cannon of European-American male fiction writers) over other groups.

Implications for leadership preparation from a multicultural education perspective include rethinking what is taught, how it is taught, and who is teaching it (e.g., Darling-Hammond & Sykes, 1999; Darling-Hammond, 2004; Fine, Weis, Powell, Wong, 1997; Sleeter, 1992; Moses, Cobb; 2001, Gay, 2000). Multicultural leadership preparation programs could not rely on past practices because the aim is for a future different than the past. Leadership preparation would require critical analysis of the "common knowledge" of leadership and the inclusion of multicultural leadership models gathered from diverse educational settings, as well as the production of new knowledge about leadership, to fully understand the social and political construction of knowledge (Table 55.4).

In summary, the theory of action for school leadership from the perspective of multicultural education is to lead schools that focus on teaching all students to produce knowledge that is meaningful while exposing the social and political implications of both the knowledge production process and the knowledge itself. Again, different from critical pedagogy, which focuses on school leadership that redistributes power, and antibias education, which focuses on school leaders' racial identity development, multicultural education focuses on school leadership that provides access to the means of knowledge production for all students.

D. Whiteness Studies

The past 15 years have seen the start of more than 30 university courses or programs in whiteness studies in the United States. The courses, conferences, and scholarship under the name whiteness studies generally locate race as the central structure of

Table 55.4 Multicultural education

Elements	Descriptions
Definition of social justice	When all people participate in the construction of knowledge and diverse contributions to the body of knowledge are recognized, not for conformity with dominant and popular thought, but for divergence and innovation.
Role of education in social justice	To learn to produce meaningful knowledge and to understand the social and political implications of knowledge production.
Theory of action for school leadership	Lead schools that teach the social and political nature of the construction of knowledge and engage students in the production of knowledge including the construction of concepts and theories that produce a more just society.
Implications for leadership preparation	Leadership preparation would increase the critical analysis of the “common knowledge” of leadership and the school curriculum and train school leaders to produce new knowledge about leadership to fully understand the social and political construction of knowledge. Leadership preparation could not rely on models from past practice because schools have not yet achieved multicultural integrity.

oppression operating in society and, therefore, in schools (e.g., Darling-Hammond, 2000; Irons, 2002; Johnson, 2001; Lewis, 1978; Lipsitz, 1998; McIntosh, 1988; Ryan, 1976; Weis & Fine, 1993). Working from the definition of racism as a system of advantage based on race (Kivel, 2002), whiteness defines and is defined as racialized privilege (e.g., Fry-Jacobson, 1998; Irons, 2002; Johnson, 2001; Kivel, 2002). This definition locates whites as “racist,” not primarily related to personal intention or action but by the nonpersonal systemic structural and institutionalized ways in which whiteness is privileged in the United States. In other words, regardless of the personal beliefs or actions of an individual white person, which may be antiracist in intention, the individual is still operating within a system of advantage that she/he benefits from. While the race category of “white” has changed over the years, it generally implicates Americans of European decent. Due to the racialized history in the US, including forced and voluntary immigration trends, Americans of European decent maintain a position of privilege based on skin color, white. This particular position, both historically defined and currently enacted, defines whiteness. While this history is complex and affords differentiated privilege across European groups, white and whiteness have emerged as terms to help interrogate the inequity of racism. In other words, racism is seen as primarily a problem constructed by and for whites. Whiteness studies aims to prepare whites to dismantle the system of advantage that serves them (Frankenberger, 1993). Whiteness studies rely on awareness to inspire a moral imperative to act for just purposes, including ending white privilege and racism.

The definition of social justice is whites, the people who benefit from white privilege, exposing and dismantling the system of advantage based on race. The role of education is to expose and dismantle the system of advantage based on race. The theory of action for school leadership is to expose and dismantle white privilege in school by having those who benefit from it learn to deconstruct it. Through examination, whites can understand the injustice of their privilege and deconstruct the myth of meritocracy, the falsehood of the American dream, deficit model thinking, entitlement, and victim blaming (Kivel, 1992, 2002; Lewis, 1978; Ryan, 1976; Skrla & Scheurich, 2001). Each of these rationales works to stabilize the system of advantage for whites. Schools would have an instructional goal to end racism by exposing whites to their own history of unearned privilege and entitlement and unjust politics.

Through the lens of whiteness studies leadership preparation would focus on preparing white leaders to understand and dismantle racism in schools. Utilizing the growing literature about the history of whiteness and the history of racism as a white construction, whiteness studies expose both the personal history and the social construction of white superiority as essential to understanding how and why racism operates in education. This information is tricky for a number of reasons. First, the inherent racism in universities and college classrooms makes focusing on this racism challenging. Decentering white privilege disrupts patterns of learning familiar to white students. It is common for white students to drop out of these conversations and courses to avoid disruption of their sense of privilege. Second, a focus on whiteness, while important for understanding white superiority in schools, centralizes whiteness in the curriculum in ways that can alienate nonwhite students. Leadership preparation must attend to these dynamics in its pedagogy and curriculum. Third, whiteness studies can serve to establish white superiority in the leadership program when the bulk of the readings focus on whiteness. Even if the readings and discussion are critical of white privilege, the conversation is still centered on issues of whiteness. A growing number of schools and school districts are not run by white leaders and are not dominated by white students, but nationally most of the teaching population continues to be white. Developing African American leaders, for example, may have little interest in whiteness other than how it operates in resistance to their leadership. The particular racial makeup of the school and community plays a role in what knowledge and skills might be most useful from whiteness studies (Table 55.5).

In summary, the theory of action for school leadership, from a whiteness studies perspective, is to identify and dismantle white privilege and entitlement in the school and school system and to expose racism as a white problem requiring changes in whites' social interactions for its solutions. Drawing on antibias education's intra-psychological, identity development approach to social justice, or critical pedagogy approach to redistributing power, or multicultural education's approach to intellectual and academic social justice, or whiteness studies approach to dismantling white privilege as an organizing tool for school leadership preparation, has possibilities and problems.

Conclusion

The frameworks above reflect a careful distillation of complex literatures. While none of these frameworks tell "the way" to organize a leadership preparation program, they do provide a model for people to conceptualize and articulate what

Table 55.5 Whiteness studies

Elements	Descriptions
Definition of social justice	Whites dismantle the system of advantage based on race. Through awareness of unmerited privilege and power whites actively resist unfair power and privilege and use any benefit they have received through the system of advantage based on race to further the purposes of dismantling the system.
Role of education in social justice	To expose white privilege and superiority and dismantle racism.
Theory of action of school leadership	Racism is a white problem with a white solution. School leaders' work is to expose and dismantle white privilege in schools and the systems of advantage that are based on race in the school.
Implications for leadership preparation	Address race and the system of advantage based on race and the central rationales that stabilize the system of advantage based on race. Resist becoming another way to draw attention to whiteness and to locate whiteness back in the center of leadership. Foster awareness to end racism by exposing whites to their own history, politics, and identities. Awareness is understood as fundamental to inspiring a moral imperative to act for just purposes.

they mean by social justice in a leadership preparation program. We argue that if a leadership preparation program does not clarify what motivates their purposes and actions, it would be wrong to say it prepares leaders to work for social justice. Each of the four theories presented offer useful ideas to draw from in creating a comprehensive leadership preparation program. Developing an activist identity, producing knowledge, critically examining the immediate conditions of learning and power, building coalitions with community partners, and recognizing racial identity could be the backbone of a leadership program's practice. A purely multicultural or antibias approach could also provide the main support for a leadership preparation program. We urge the faculty to use the work we have done here to help organize your thinking as you sort through the literatures and program practices to determine what precisely you intend to prepare school leaders to do. It is also our hope that the faculty will use these frameworks for further study of leadership preparation programs. In doing so, we are confident that our collective understanding of what it means to prepare a school leader to transform his or her school into an organization that promotes social justice will grow and change. On many college campuses, the faculty have avoided the topic of preparing leaders to lead for social justice in education. Their avoidance is understandable, yet problematic. We hope this chapter will provide the faculty an opportunity to further their work in the area of planning and implementing leadership preparation that prepares school leaders to transform their schools into institutions that promote social justice. We believe that the faculty in leadership preparation programs, and their students, are poised to meet this challenge.

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Chapter 56

Issues of Social Justice and Fairness in the Development of Aspiring Head Teachers: I Had Not Really Thought About My Values Before…

Christine Forde

Introduction

Bogotch (2008) sees the project for education as one of 'seeking a pedagogy and leadership that might guide us towards change and social justice' (p. 94). However, what drives education policy currently in Scotland as elsewhere is the search for effective practice and the improvement of pupil attainment. Further, while education is seen as a means for achieving greater equality and fairness, this is not the only driver, nor indeed the dominant driver in education policy. Instead education is placed as a strategy for economic development. The alignment of educational policy with economic performance in many developed economies has been underlined by the recent report from the Organisation for Economic Development and Cooperation [OECD] (2010), *The High Cost of Low Educational Performance*. Written by two economists, this report uses PISA (Programme for International Student Assessment) scores of cognitive skills to identify the impact of lower attainment scores on a country's economy. This report illustrates the issue Bogotch (2008) points to where the measurement of success is decontextualised particularly through the pervasive use of sets of performance indicators or attainment targets to make comparisons between individual institutions or more recently between national educational systems. As Bogotch argues, these crude measures of performance and the high-stake public accountability of individual institutions and practitioners that accompanies these measures have had the effect of creating a strong sense that any new ideas are to be resisted – even those ideas around social justice and fairness which could pose a challenge to these technologies of performance management and accountability. These forms of performance management shape the governance of education in

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Scotland and so are highly significant in questions relating to the preparation of aspirant school leaders. Professional development programmes have to recognise the policy frameworks within which school leaders must operate particularly around issues of public accountability, the orthodoxies relating to effectiveness in education and the improvement of pupil learning outcomes. The question then is how do we imbue such programmes with a sense of leadership for social justice which, at its heart, is about not only challenging current practices and assumptions but transforming education. To begin to address this question, we need to consider the articulation of these values in Scottish educational policy.

Values and Questions of Social Justice in Scottish Education

If we want to explore the development of leadership for social justice, equality and fairness, a useful starting point is to examine the 'values' underpinning Scottish public education (public education forms 95 % of school education provision in Scotland, ScotGov (2010). The articulation of such values in education has evolved from a point where concerns were expressed about the legitimacy of any public statement of values in education to a position now where educational policy is guided by a clear legislative framework in relation to equality.

In 1991, the main curriculum development body for Scottish education, the Scottish Consultative Committee on the Curriculum (SCCC), published *Values in Education*. The paper recognised that the explicit articulation of values was, at that point, a new step for many schools and that there could be much debate about what values were to be identified: 'There is a fear that any commitment to an explicit statement of values might be used as an instrument of social control, as a device to stifle dissent, and to entrench currently received ideas' (Scottish Consultative Committee on the Curriculum [SCCC], 1991: 4). Nevertheless, sets of values in education were put forward:

- Appreciation of learning
- Respect and caring for self
- Respect and caring for others
- A sense of belonging
- Social responsibility (SCCC, 1991: 4)

Most of these sets of values seem at first glance to be concerned with personal and interpersonal dimensions, and only 'social responsibility' seems to have more of an orientation to social justice:

> Social Responsibility:
> to develop among all learners personal responsibility in society at local, national and international levels. (SCCC, 1991: 9)

Included in social responsibility are skills relating to participation as a citizen and global awareness, respect for democratic processes, justice and the environment. There is also an explicit reference to economic disadvantage and, perhaps uniquely, the consequences of an unchecked approach to economic growth: ‘appreciating the ways in which wealth is generated and the impact of wealth creation on the world and on the environment’ (SCCC, 1991: 9). However, dimensions of a wider understanding of social justice also ‘pepper’ the other aspects. Part of an appreciation of learning relates to appreciating cultural difference and freedom of expression and developing understanding of the importance of a cultural perspective, respect for evidence and freedom of expression as the foundational elements of a democratic society. Respect and caring for others include valuing racial, ethnic and religious diversity, and a sense of belonging recognises the importance of the diverse cultural and faith communities children and young people belong.

At this point, 1991, the exposing to scrutiny of the implicit values that shaped practice and culture in Scottish schools was highly significant. This thinking did evolve in three ways: firstly, into ‘values education’ which became linked with religious and moral education (one of the core curricular areas in Scottish education) and, secondly, into some of the ‘technologies’ related to school effectiveness and school improvement with schools being required to develop ‘mission statements’ and sets of aims with their stakeholders. The third way in which the issue of values in education was taken forward was in the explicit articulation of values within educational policies.

Educational Policy in Scotland

Policy development is a three-layered process in public education in Scotland: with policy articulated at national level and then translated into practice through local and institutional policy frameworks. Here we see a set of values again being publically articulated but there is a move from broad statements about ‘respect’, ‘care’ and ‘appreciation’ to an increasingly assertive stance on the importance of equality and fairness in education and the contribution of education to ensuring equality and fairness in society. These values are evident in a range of policy developments in three core areas: (1) the curriculum, (2) professional standards and (3) quality assurance.

Scotland has been undertaking a generational programme of curriculum reform: *A Curriculum for Excellence* (Scottish Executive [SE], 2004). This reform programme is situated in a sociopolitical context where there is an emphasis on creating and supporting an engaged, highly skilled and participatory citizenry of an increasingly diverse society. In this curriculum programme for ages 3–18, the focus is on high cognitive skill, holistic development and interdisciplinary learning. Further the curriculum framework is underpinned by a set of key capabilities to be developed which reflect the sociopolitical and educational aspirations of Scotland:

> Like other countries we face new influences which mean that we must look differently at the curriculum. These include global, social, political and economic changes, and the particular challenges facing Scotland: the need to increase the economic performance of the nation: reflect its growing diversity; improve health; and reduce poverty. In addition, we can expect more changes in the patterns and demands of employment, and the likelihood of new and quite different jobs during an individual’s working life. (SE, 2004: 10)

The outcome of *The Curriculum for Excellence* framework is the four capacities. Thus, the purpose of education in Scotland is to enable children and young people to be 'confident individuals, responsible citizens, effective contributors, and successful learners' (SE, 2004: 12). While these capacities might be similar to the outcomes sought in many educational systems, the historical context of Scottish education has been influential in the stated values underpinning this curriculum framework. In 1998 devolved government was instituted in Scotland with the (re)establishment of the Scottish Parliament. This is very much reflected in the foundational document for this programme of curriculum reform:

> Wisdom, justice, compassion and integrity: the words which are inscribed on the mace of the Scottish Parliament have helped to define values for our democracy.
>
> It is one of the prime purposes of education to make our young people aware of the values on which Scottish society is based and so help them to establish their own stances on matters of social justice and personal and collective responsibility. Young people therefore need to learn about and develop these values. The curriculum is an important means through which this personal development should be encouraged. (SE, 2004: 11)

This programme of change in Scottish education has implications for the role of teachers and the role of leaders in school, and so the issue of values has become part of the professional standards teachers and leaders are expected to achieve. In Scotland there is a suite of professional standards relating to different stages and roles in the teaching profession. Extant are four professional standards which cover initial teacher education and registration (GTCS, 2012a), continuing professional learning (GTCS, 2012b), and leadership (GTCS, 2012c). The design of these professional standards has been based on the understanding that 'professional practice' – whether in leadership or teaching – is through the ability to undertake professional actions based on sound knowledge, effective personal and interpersonal attributes and professional values and personal commitment.

In this discussion on leadership development and social justice, *The Standard for Headship (SfH)* is particularly relevant. The shift towards greater specificity is evident in the different versions of the professional standard for school leadership. In the first *SfH* (Scottish Office Education and Industry Department [SOEID], 1998), the importance of values was recognised, but there was a reluctance to specify what these values were, beyond these being described as 'educational values'. In the revised standard (GTCS, 2012), there was a much clearer articulation reflecting the values set out in other frameworks. Under the essential element, 'Strategic Aims, Vision and Values', in the *SfH*, the following are identified:

> In SfH SE (2005a) the focus is on 'Integrity and ethical practice': and on 'Democratic values' (SE 2005a: 6). In the most recent SfH now there is specific reference to Social Justice which includes global sustainability, equality, diversity, education as a human right and a commitment to learner engagement in real world issues (GTCS, 2012c: 6)

Similar themes are also evident with the quality assurance frameworks. Scotland has a national quality assurance framework for schools, *How Good Is Our School* (Her Majesty's Inspectorate [HMI], 2002; Her Majesty's Inspectorate for Education

Table 56.1 Equality and fairness in quality assurance

Date	1996	2002	2006
Title	How Good is Our School?	How Good is Our School? 2002 Edition	How Good is Our School? The Journey to Excellence (Part 3)
Indicator	5.1. Ethos: A sense of identity and pride in the school, equality and fairness	5.3 Equality and Fairness: A sense of equality and fairness Ensuring equality and fairness	5.6 Equality and Fairness: Approaches to inclusion Promoting equality and fairness Ensuring equality and fairness

[HMIe], 2006; SOEID, 1996), which is the basis for external inspections carried out by Her Majesty's Inspectorate in Education (HMIe). Over a series of publications, we can see the way the idea of 'equality and fairness' has not only gained more importance in education, but there is greater clarity about the areas of concern (Table 56.1):

In this quality assurance framework, we see a move from a broad sense where 'the work of the school at all levels is imbued with equality of opportunity and a sense of fairness' (SOEID, 1996) to a much stronger sense in the 2002 version (HMI, 2002) where there are active steps to be taken by school leaders not only in building the ethos of the school but ensuring that equality of opportunity is provided. Thus, there must be evidence of 'fairness' in the activities of the school: 'positive steps are taken to ensure pupils, parents and staff are treated equally with respect and in a fair and just manner: culture and language, disability, gender, race, religion, sexual orientation and special educational need are not barriers to participation' (HMI, 2002: 54). In addition, there is an explicit statement identifying groups of pupils who may be particularly vulnerable:

> refugees, traveler children, looked after children, those for whom English is an additional language, pupils with disabilities, those with irregular attendance caused by illness, family circumstances or respite care and any other potentially vulnerable group within the school experiences of pupils. (HMI, 2002: 54)

A further development is evident in the current framework (HMI, 2006). Whereas in previous documents special educational needs or support for learning was treated as a separate aspect, in the 2006 framework, a clearer link with inclusion in education is made. Further, schools are now obliged to gather information about the achievement and progress of different groups as part of efforts to ensure equality and fairness. Thus, school leaders must make sure that 'diversity in the school community and beyond is valued' (p. 32). In addition, there is specific guidance for schools in relation to the provision of education to additional support needs and race equality (HMIe, 2004a, 2004b).

Thus the ideas of 'fairness and equality' have gone from almost an afterthought in the first quality assurance framework in 1996 to a specific criterion which carries requirements on the part of the school leader. As we have seen, the focus is on 'equality and fairness', and the term 'social justice' is rarely used. It could be argued that this is more about vocabulary than expectations and practice: that implicit in ideas of equality and fairness is a sense of social justice. On the other hand, it could be argued that 'equality and fairness' can be interpreted within the confines of a school's immediate activities: that the school has a duty to ensure there are 'equal opportunities for all' and to ensure all activities are conducted in a fair manner. In contrast, the term 'social justice' signals a wider socio-political impact. Thus, in these policies, the relationship between the educative process and wider sociopolitical transformation can be underplayed unless there is an explicit connection made with ideas related to social justice. While part of the task of the Scottish Qualification for Headship is to enable school leaders to address educational policy, equally important is the setting of educational policies within a wider sociopolitical frame, a dimension often not included in leadership development programmes. A limited form of leadership development will fail to acknowledge the wider legislative framework in which head teachers have to work and the contested nature of policies and their underpinning values and purposes.

Social Justice and Social Policy in Education

With the reestablishment of the Scottish Parliament in 1999 and as part of the 'nation building', there was a recognition of not only the increasingly diverse and pluralist nature of Scottish society but that the experience of exclusion and marginalisation in poor communities was significant. Thus, in a report from the Parliamentary Taskforce on Poverty and Inclusion, *Social Justice…a Scotland where everyone matters* (SE, 1999: 18), a wide ranging definition of social justice was set out.

> Social justice and equal opportunities
>
> We will promote equal opportunities and challenge discriminatory attitudes and practices. Some groups within our society suffer persistent injustice. This is often caused and exacerbated by discrimination and prejudice. Women form a significant proportion of groups vulnerable to poverty, especially lone mothers and elderly women. People from minority ethnic communities and people with disabilities also suffer injustice or discrimination, and continue to encounter barriers to their full participation in employment and in society more generally. Discrimination on the grounds of sexual orientation restricts opportunities and contributes to injustice. Age discrimination, too, means that society is failing to benefit from the skills and experiences of all its members. We are working to make sure equal opportunities for all is part and parcel of all our programmes. Gender, race, sexual orientation, disability, age - these should not be allowed to affect choice and opportunity in the new Scotland.

This position, which includes the ambition to end child poverty in a generation, is evident in subsequent legislation. Since *Standards in Scotland's Schools etc.*

Act 2000 (Scot Parliament, 2000), education has moved from being a compulsion (as per the 1872 Education Act which introduced compulsory education) to being constructed as a right; the opening statement of the 2000 Act declares that 'It shall be the right of every child of school age to be provided with school education by, or by virtue of arrangements made, or entered into, by, an education authority [the local district]' (Section 1).

The specific Scottish legislative framework sits within wider UK legislation – the *Equality Act* 2010 which lays a public duty on the public sector and so covers schools in Scotland. This equality duty includes the following:

> Eliminate unlawful discrimination, harassment and victimization and other conduct prohibited by the Act.
>
> Advance equality of opportunity between people who share a protected characteristic and those who do not. (Equality and Human Rights Commission [EHRC], online)

It would seem from this substantial legislative framework that questions of equality, fairness and social justice have been addressed or at least the means of ensuring such issues are addressed are available in Scottish education. However, there remain significant tensions which relate partly to assumptions about the egalitarian nature of public education and the continued existence of persistent social marginalisation and poverty. Tensions are partly to do with the role of school leaders and the enactment of government policy.

Education and Equality of Opportunity in Scotland

One of the iconic figures of Scottish education is the idea of 'a lad o' pairts', that is, a bright boy from a humble background could progress through school to university and into the professions. However, this myth is now more revealing of a monocultural society where although education was seen as a social good, conformity sat side by side with educational opportunities based on merit for a small minority. Progress was deeply gendered and reflected a historical divide between two religious communities – 'the lad o' pairts' was solidly within the Presbyterian tradition, and the largest minority group, the Catholic community who had emigrated from Ireland and the Highlands of Scotland to the central belt of Scotland, remained outside the public education system. Since that time Scotland has become much more socially diverse through immigration from India and Pakistan in the 1960s and increasingly from Africa, Hong Kong and parts of Eastern Europe. There remain social divides that in many respects are becoming more entrenched, notwithstanding the myth of the 'lad o' pairts'.

Patterns of underachievement are evident in relation to factors such as ethnicity, disability and gender, and these differences in attainment are becoming more apparent as more migrant learners from diverse circumstances are coming into Scottish schools. Changing social trends of not just greater diversity, but the continuance of poverty and indications of the creation of 'an underclass' through generations of worklessness and poverty and a decrease in social mobility over the last 20 years, has brought the issue of values in education into sharp focus. In Scotland, the impact of social class and poverty remains profound in determining educational achievements and the destinations of young people post-school. Thus, Iannelli and Paterson (2005: 14) argue that their analysis:

> has shown evidence that, for people born since the 1960s, the direct influence of class of origin has started to become more important again, after a post-war interlude in which acquiring credentials seemed to be emerging as the main way in which middle-class children acquired middle-class jobs. The role of education is still strong, but it is not getting stronger, and may be weakening.

Thus, while comprehensive education continues to exist, there are significant disparities between the attainment and achievement of pupils largely based on economic disadvantage. At the same time issues of equality and fairness are threaded through policy in Scottish education. However, the language of social justice is not always explicit in educational policy, and so there is a danger of a reductive approach with equality and fairness reduced to matters of attainment rather than social transformation. We need to move beyond just the recognition of ‘equality and fairness’ in education and understand these as political processes relating to redistribution and transformation. This tension is acerbated by specific expectations around improvement and effectiveness which not only dominate the policy imagination but also drive accountability regimes.

The core purposes of education are reiterated time and time again in terms of ‘effective learning and teaching’ (HMIe, 2006), and while clearly this has to be of fundamental importance, the issues of equality and fairness remain abstract ideas or problems to be faced in terms of individual pupils rather than systemic sociopolitical issues. The drive for improvement alongside the demand for ‘effective learning’ has led to an emphasis on attainment particularly in public examination system as the measurement of success. Notwithstanding the wider legislative framework, which underlines the importance of equality and fairness, there is a tendency to look to teaching strategies and learning theories which improve the learner’s ability to attain. Solutions are sought that are psychological in nature – looking to brain theory, developmental psychology and the affective domain. Where social learning processes are used, a ‘therapeutic’ discourse predominates (Ecclestone & Hayes, 2009) rather than any sense of social activism for change. It is this tension that runs through debates about leadership development and particularly headship preparation.

Leadership Development

Hernandez and McKenzie (2010) argue for programmes to explicitly prepare leaders for social justice, and so we need to tease out the place of issues related to social justice in approaches to professional learning. Debates about continued professional development of teachers and leaders in Scotland are dominated by the question of ‘impact’ (Donaldson, 2011), and the search is for forms of provision which have a demonstrable positive impact on pupil attainment and achievement. Side by side with this, there is a discourse which favours experiential learning. This drive to adopt more experiential approaches particularly mentoring and coaching (SE, 2006) reduces the wider sociopolitical dimensions of education. The focus is on sharing 'practice' and exploring solutions to problems of interpersonal conflict or resistance to change. Although some models of coaching look at institutional power relationships and the micro politics of schools as organisations, this largely focuses on transformational leadership (Davidson et al., 2008) where the task is to develop and enhance sets of interpersonal skills to engage, influence and persuade others of specific courses of action. In these models of professional learning, there is a danger of focusing on technical aspects and on policy implementation rather than the development of more critical capacities. This is a limited construction of leadership development and does not relate to the needs articulated by school leaders themselves.

Recent studies on the views of school leaders about their ongoing professional development highlight the importance of opportunities to reflect in order to interrogate practice and values. A survey of the views of serving head teachers in Scotland conducted by Woods et al. (2009: 246) indicates that a substantial proportion of respondents (62 %) wanted time for reflection on their values:

> Time for reflection can be for the individual but can also comprise periods of shared reflection in which a group of headteachers take time out to consider and re-evaluate their principal values, as one headteacher found with his preparation for headship (that is in the SQH).

There is a danger in such processes that reflection becomes simply confirmatory, and the harder questions and dilemmas where there are significant tensions related to social justice are not fully explored. Here Woods et al. highlight the useful of 'disturbances' as interventions (p. 261). Therefore, we need to look to approaches to professional learning that enable aspirant and serving head teachers to analyse problems on the basis of more philosophical questions of social justice, equality and fairness and appreciate some of the tensions inherent in such situations rather than be driven to find immediate and largely superficial solutions. A starting point is to consider the implications for the preparation of school leaders.

Questioning Assumptions: Lessons from the SQH

The *PG Diploma in School Leadership and Management (Scottish Qualification for Headship) (SQH)* is the professional qualification for headship in Scotland and is a mixed mode programme which combines taught elements with practice-based learning. Participants undertake this programme part-time as they continue in their current leadership role in school. The first two units of the programme are designed to enable the participants to examine, firstly, their values, purposes and practices as a leader in school and, then secondly, the school's culture and capability for change. The final two units then relate to the initiation, implementation and evaluation of a strategic change programme which contributes to the improvement of the quality of pupil learning experiences. The participants must identify specific success criteria using baseline data and then demonstrate the outcomes that have been achieved through this change programme conducted over an 18-month period. It is through this strategic improvement initiative aspiring head teachers demonstrate their holistic achievement of the *Standard for Headship* (SE, 2005) where professional actions must be underpinned by sound knowledge and clear educational values. Thus, efforts are made to ensure that there is not a division between the exploration, debate and articulation of values in the first phase of the programme and leadership practice in school in the second phase. The starting point in the *SQH* programme is a consideration of 'values' in education and to set education in a wider sociopolitical context.

Blackmore (2009) argues that we need to develop a critical pedagogy for leadership development. She advocates drawing on theoretical perspectives particularly critical race, queer and feminist post-structural approaches. She argues that 'these theories can disrupt our taken-for-granted assumptions of what leadership is, what it can be, and what purpose it ultimately serves'. These theoretical insights provide a critical framework for the examination of unquestioned beliefs particularly on questions relating to social justice. However, we have to recognise that in much of the provision for the continuing development of educators and educational leaders, the drive is to effect 'best practice' and there is a resistance to what is often characterised as theoretical or academic. The challenge then is to draw on these perspectives to develop critical tools among aspirant head teachers in ways that are accessible and meaningful to the participants. In the *SQH* programme, a series of activities are undertaken to enable participants to interrogate their values and appreciate some of the tensions related to the purposes of education.

Thinking About Values

All schools in Scotland have mission statements and sets of aims. However, these values are cast in such a way that some of the underpinning tensions and differences are not explored. The starting point for the *SQH* programme is an exploration of values in education set within an understanding of the sociopolitical dimensions of education. A theme reiterated by successive cohorts of *SQH* candidates is the impact that pursuing the programme has had on their understanding of the place of values in their leadership role. When asked to comment on what they got from the exploration of the purposes and values in education, the following are typical (Table 56.2):

These comments from participants relate to a series of activities to identify what they see as their core values and collectively interrogate these. Here we see that for many aspirant head teachers, this may be the first time they have thought about their values in any depth and for some this in itself is transformative. Typically candidates gain greater clarity in the place of values and become more skilled in their articulation of their values as a leader. What also comes across strongly is the growing understanding of the contested nature of values. This challenges previously

Table 56.2 Thinking about values

Clearer understanding of the challenges of establishing closely own values and ideas on purposes
Understanding there are competing views of the purpose of education. I have established in my own mind the purpose of education, and this will inform my vision and values for leading a school
This focused my ideas and then made me question and reassess my understanding
Competing views and my stance and how it has changed
Best session so far really led to reflection on own values and helped to focus on the differing needs when relating to other people's values
Interesting to note how the values overlap. How inextricably bound they are – yet to make an attempt to separate then out, clarify thinking. Also – how much these issues do need discussed openly, since their language is ambiguous and so open to interpretation – 'achievement', 'quality', 'equality'

unquestioned assumptions and the sense that values are largely shared and 'common sense'. Further, as these participants progress to lead a strategic change project, there is the appreciation of the need to base decisions and actions on values. However, what is missing from these comments, as we have seen in policy, is the lexicon of social justice. There is a danger that ideas about social justice and fairness become reduced to common sense – 'of course we want all children to achieve'. Thus a vital step has to be about the definition of social justice. Course members then undertake a mapping exercise to explore the concepts of 'social justice', 'fairness' and 'equality' and the relationship between them. In this typical set of responses, we see different broad dimensions being highlighted (Table 56.3).

Building a Model for Leadership Development for Social Justice

The activities above can be characterised as the classic methodology in social activism, that of consciousness-raising. An example of this methodology can be found in Jean-Marie's (2010) approach as an educator of aspiring and serving principals where she reflects critically on her own practice. Drawing from her personal experiences, Jean-Marie explores the way in which she has imbued her own praxis with a social justice stance by adopting critical pedagogies. In the *SQH* programme, we adopt an active socially based pedagogy which privileges collaborative learning and critical reflection on values and practice in order to develop a sense of agency and self-efficacy on the part of the aspirant head teachers as they move into headship. However, there are limitations on approaches based on consciousness-raising particularly when the cohorts of aspirant head teachers are those for whom education has been an arena where they have experienced success both as learners and now educators. In these circumstances, as Blackmore (2009: 5) argues, there can be 'a failure to trouble existing leadership practices in the field' and proposes that there is

Table 56.3 Defining social justice

Doing the right thing
Each according to his needs
Caring for all
No discrimination
One's background does not result in inequality of opportunity
Moral bases
Big picture
Needs strategic leadership
Respecting the views of others
Opportunity to shine for all
Social status does not dictate opportunities for the individual
All have a right to a voice and be listened to no matter background, culture
Does our school care for all in the school community
Understanding everyone deserves a change
Access to what is needed to learn
Knowledge of right and wrong
Right to be heard
Right to be safe
Right to grow educationally and emotionally
Entitlement to advance own personal goals
Democratic values
Opportunities to excel
Core values of respect and diversity

a need for 'leaders to reflect on their own position with the relations of ruling'. The question then is how do we take on Bogotch's challenge (2008: 10) and move beyond consciousness-raising about issues of social justice, fairness and equality to a point where educators and educational leaders are able 'to make a practical difference in the real world' (Bogotch: 103). Here we need to look to the means through which experience and ideas interplay in the development of approaches to social justice within specific institutional contexts.

Lindsey, Lindsey, and Terrell (2011: 27) advocate 'cultural proficiency as a social justice approach that focuses on our practice as educators, not on perceived deficiencies of the students and communities we serve'. They define social justice as 'doing what is right for our students'. However, we need to interrogate this idea for it seems to suggest that social justice is simply a matter of understanding the needs of each child and addressing these. It is at this point that the tensions between policy discourses, around 'getting it right for every child' 'achievement for all' and 'realising full potential', need to be exposed and interrogated particularly in a context where the high accountability regimes still largely focus on attainment data related to public examinations. Scenarios such as the following are useful ways of beginning to unpack some of these tensions:

Scenario
Using statistical data, the school has identified that if a small percentage of secondary year 4 pupils (18 % of the year group) improved their examination results by one grade, there would be an overall significant increase in attainment. A mentoring programme has been proposed. This will entail reallocating teaching and support resource from a low achievers programme.

Particularly important here is the construction of these problems not simply as emotional issues or interpersonal conflict which has to be 'managed', that is, a swift solution found in order that 'things can go back to normal'. Instead as Murphy (2007) argues such situations need to be constructed as ethical dilemmas resolved on the basis of principle. Scenarios help to illuminate some of the tensions and dilemmas in leadership, but there is always the danger that such scenarios remain detached from the experiences of school leaders. The process is strengthened then by participants identifying and analysing situations where they have faced a dilemma. This aspect is not always fully realised given that some participants will not necessarily have had substantial experience in making decisions – this would be the task of their own head teachers. Further, the situations that are proposed as often are ones that are exceptional, and again there is a danger of these being seen as infrequent circumstances. There is a need to go much deeper and examine the skills, attributes and actions of leadership for social justice whereby through their practice, school leaders create the conditions in school for a more socially just education. Therefore, we need to consider the construction of leadership that underpins preparatory programmes for aspirant head teachers.

The Construction of Leadership

One of the issues faced regularly in leadership development in education in Scotland is the 'cosy consensus' around issues related to social justice. As we have seen Scotland now has a well-developed legislative and policy framework around issues of equality, social justice, inclusion and fairness. Educational policy is replete with demands that relate to attainment for all. For example, one of the features of 'excellence' is a school that 'focuses on outcomes and maximizes success for all learners' (HMIe, 2006: 44). The question then is how can ideas of equality, social justice, inclusion and fairness shape leadership development and practice. Theoharris (2010: 333) argues that leadership for social justice is about 'how they [school leaders] 'live out' this definition in their practice'. Thus, in exploring leadership for social justice as a lived process, we need to consider the circumstances in which leadership is exercised. The reality is that most school leaders not only have to deal with competing demands especially in a situation where there are finite resources in terms of time, staff skill and an ever expanding set of expectations on schools by different stakeholders. Therefore, as part of the development of leadership for social justice, we need to construct leadership as a political process, where leadership is the exercise of power to influence others to achieve specific aims.

In the *Standard for Headship* (SE, 2005) 'political insight' is one of the personal qualities and interpersonal skills:

> **4.3.4 Showing political insight:**
> Headteachers have a good understanding of the relationship between schools and society. They understand and take account of the political and social context of educational policy. (SE, 2005: 7)

This construction of 'political' in leadership practice is in terms largely of understanding, adapting to the political decision-making process which shapes education policy by local and national government.

Ryan (2010) takes a slightly different perspective arguing that the use of political skills or acumen is a means of enacting equality policies. His study

> …examines principals' political acumen… it explores their efforts to understand their political contexts, the manner in which they employ their knowledge in the strategies that they use and the ways in which they strategically monitor their actions as they work towards their equity goals. (p. 358)

Ryan identifies three broad areas of skills in this political acumen – an understanding of the political environment, developing political strategies such as 'developing and establishing relationships, persuading others, persisting, planning, experimenting, being up front, keeping others off balance, playing ignorant, working the system and quietly advocating' (p. 366). And these skills are balanced with an understanding of the needs of the context and power relations. This political process has to be imbued with a sense of social justice. Studies by both Theoharris (2010) and Ryan (2010) illustrate the critical importance of not only the stance adopted by individual leaders but their efforts to realise these values in school. Theoharris's study illustrates the significant resistance school leaders meet in pursuing the aims of social justice largely because as Hynds (2010: 378) argues, resistance to change is 'typically connected to individuals' values, beliefs, professional identities, social position and response to change'. We cannot then underestimate the task faced by school leaders in seeking to bring about change in relation to promoting social justice. For Ryan the use of these political skills is central to leadership for social justice. However, while pointing to the critical role political skills play in leadership for social justice, we need to be clearer around the nature of leadership being proposed here and be cautious about regarding this as the definitive model of leadership.

What is being pointed up in Ryan's analysis is a form of transformational leadership in which leadership is characterised as the exercise of power to influence stakeholders to achieve specific goals. Here the concerns relate to inspiration, influence and the development of a shared vision and values, aspects consistently identified as key factors in the policy on educational improvement in Scotland (HMIe, 2006). More recently there has been a growing focus on the impact of school leadership and learning (e.g. Bell, Bolam, & Cubillo, 2003; Leithwood et al., 2006) from which has emerged a greater emphasis on instructional or pedagogical leadership. Robinson et al. (2009) in their synthesis report of studies examining the impact of school leadership on pupil achievement note that alongside transformational leadership where the focus is on influencing others to act in accordance with specific positions or policies, pedagogical leadership looks to the shaping of conditions for and practices around teaching and learning. In their review, the authors found that 'pedagogical leadership' had a substantially greater impact on the quality of teaching and learning and pupil outcomes than transformational leadership. The idea of pedagogical leadership has evolved in Scotland into the idea of 'leadership for learning' (HMIe, 2007). However, the model of change within this construction remains managerialist. For example, in guidance from the HMIe, the following are the steps leaders can take to bring about change:

- Clear remits for working groups and/or committees
- Time for staff to talk about and reflect on learning and to learn from each other
- Involvement in action research projects
- Clear tasks linked to the improvement priorities
- SMART targets with associated milestones
- Regular monitoring and progress reporting (HMIe, 2007:50)

Therefore, constructing leadership in terms of influence and pedagogy are vital aspects but not sufficient in themselves.

Headship as Social Activism

The drive in Scotland is to raise attainment in public examinations, and within this there remains a strong sense of a meritocracy; the success of individual schools is measured by attainment and underpinning; this is a sense that 'bright children' have the opportunity to progress to their 'full potential' regardless of their social background. However, the focus predominantly on attainment and outcomes can reduce the scope of leadership. A more fundamental restructuring through education is not fully engaged. Therefore, we need to reconstruct school leadership. Berman (2011: 129) argues:

> Leadership for social justice and democracy involves more than believing in and articulating a vision, however. It means providing the leadership for integrating into a culture of schools and into classroom instruction those programs that effectively engender social responsibility and develop social consciousness.

The task then is to shape leadership development programmes to enable participants not only to understand and articulate values related to social justice, equality and fairness and to appreciate the dilemmas posed in seeking to work towards these but to use these principles to challenge structures and practices which create barriers to learning. Theoharris (2010) found in his study of the strategies used by those school principals who sought to challenge injustice that attainment was not the specific focus of their activities. Instead these principals look to achieve a fundamental reshaping of the school. The focus for these head teachers is on challenging practices in relation to 'school structures which marginalize, segregate and impede achievement' (p. 341), developing and empowering staff in their role in promoting social justice and creating an ethos which was inclusive particularly for marginalised families. We cannot underestimate the complexity of the task and the risks in this form of critical school leadership which understands and challenges power, tradition and unquestioned assumptions both within the school and in the wider community and political context. Mullen (2008: 275) sees social justice as an educational intervention that connects theory to practice and the moral use of power: 'injustices should not be taken-for-granted, everyone in education has a serious role to play with respect to identifying if not addressing, injustices in our immediate and more remote locations'. It is here that the 'grit' of social justice can help interrogate policy, strategy and practice. This interrogation will help expose some of the tensions particularly where resistance is evident.

Pushing these barriers helps to underline the public role of head teachers in leading change for social justice. As Marshall and Anderson (2009: 9) highlight, there are the considerable risks for educators engaging in activism around issues of social justice and equality:

> Educators thus, sense the informal rules the hierarchies and patriarchies embedded in education professions and the tacit agreements about avoiding uncomfortable issues, the constraints presented by cultural traditions that define behaviors and guard against upsetting influences by 'outsiders'.

School leadership has to be based on a model of leadership for social justice otherwise the reproductive function of public education in Scotland will continue to perpetuate inequalities, social divide and injustice.

From the preceding discussion, we can set out a model for leadership development programmes to ensure that social justice is the pivotal principle underpinning leadership in school (Table 56.4).

Conclusion

Bogotch (2008: 79) in the light of the array of problems not addressed by the theorisation of social justice across different disciplines poses the question 'why then has the alternative empirical options of education not been re-considered as a viable if not the *better social justice response*' (italics in the original). To my mind though there are two levels in which theorisation from the empirical data can occur – one through large-scale educational research and the other more locally constituted theory-in-action. This latter aspect is a vital dimension given that education is a deeply contextualised practice. In this though, we need to move beyond understandings of 'practice' as simply sets of strategies and where the imperative for educational research both at the macros and the institutional levels is to delineate 'what works best'.

Table 56.4 Towards a model of leadership development for social justice

Phase	Aspect	Possible tasks
1	Consciousness-raising	Exploration of concepts and definitions Exploration of own experiences as a learner and educator
2	Understanding dilemmas	Exploring scenarios Exploring experiences
3	Skills for social justice	Building skills for transformational leadership: influencing, engaging, debating; dealing with different standpoints Building skills for pedagogical leadership based on learning for all
4	Headship as social activism	The articulation of values Values used as the lens to shape and reflect on action

Here theorisation must be accompanied by critique which is imbued by ideas of social justice, fairness and equality. If we are to achieve Bogotch's challenge about education contributing to the theorisation of social justice, one important source would be to consider the processes of theorisation found in the process of theory-in-action in the development and practice of school leaders. For aspirant and serving head teachers in public education in Scotland, at the heart of their role, there is a contradiction: their task is to improve educational achievement for all, but as Blackmore (2009: 4) argues, at a policy level there is 'a refusal to address the structural and cultural factors that will make a difference'. Pryor (2008: 280) argues that what we need is a 'vision of leadership that encourages debate, deliberation and disagreement of school policy and concerns'. Building leadership for social justice as the underpinning stance (which incorporates ideas of transformational and pedagogical leadership) in preparatory programmes for head teachers challenges this contradiction in that the expectation to work for social justice becomes the premise on which the leadership practice of aspirant head teachers is based, and by examining the way in head teachers grapple with these challenges and dilemmas, this process of theory-in-action can contribute to the ongoing task of the theorisation of social justice.

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Chapter 57
Cultural Dialogue as Social Justice Advocacy Within and Beyond University Classrooms

Carol A. Mullen, J. Kenneth Young, and Sandra Harris

> Dialogue cannot exist … in the absence of a profound love for the world and for men. The naming of the world, which is an act of creation and re-creation, is not possible if it is not infused with love. (Freire, 1972/2000, p. 77)
>
> We learn by getting comfortable with being uncomfortable. (graduate student, Texas)

In this dialogic chapter, we theorize about cultural dialogue in educational and public spaces as social justice advocacy. Our thesis is that difficult cultural dialogue advances social justice in education and leadership and that cultural dialoguers cultivate improved learning and teaching. We support our stance by articulating specific contextual meanings about social justice that foster value for cultural dialogue within and beyond university classrooms and, specifically, as interventions for leadership preparation. These notions—for us, intricate beliefs about the value of dialogue as advocacy—inform our work as educational leadership professors and program directors in doctoral-granting institutions in the United States.

Cultural dialogue as a pedagogy is closely aligned with the views we present on social justice and the illustrations we provide of social justice advocacy in education from various studies for different populations. Our purpose is to describe the need for collectively raising critical consciousness about inequities and disparities ingrained in societal structures for disadvantaged populations. We bring to the fore cultural interventions that help position educators and leaders not only to understand schooling conditions but also to exert agency as social justice advocates.

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Leadership actions are described, with anchorage in leading studies from the educational leadership and teacher education research. Readers are encouraged to take next steps for considering leadership actions that transform educational environments into healthy, collegial spaces for learning.

This chapter is thematically organized to address the importance of reorienting the educational leadership field to address social justice theories, with particular relevance for leadership preparation. Also included is discussion of cultural dialogue as social justice praxis, in addition to ideas and practices of social justice advocacy in school communities, countries, and legislatures. Another discussion point encourages thinking about social justice ideas within and beyond local contexts and at all levels of the educational system so that students can benefit from social justice advocacy in their own lives. A final idea expressed is for different constituent groups from around the world to collaborate by developing new platforms for cultivating cultural discourse in teaching and learning contexts.

The student and educator groups that we reference throughout in a range of contextualized studies include our own students who, as practicing school leaders and experienced teachers, live the tensions of school-based inequities. We have immersed them in dialogic interventions, a primary goal of which is raise their consciousness about dynamics of cultural dominance and commitment, and another goal of which is to accelerate their role of positively affecting their school cultures and the lives of young students and adults. By *student*, depending on the context we are writing about, we mean graduate students in educational leadership, undergraduate students in teacher education, or school-aged children and youth.

Stimulated by the mold-breaking, textual dialogues of scholars from different disciplines, we describe a few pivotal concepts and support these with illustrations in the literature of social justice. We explore the value of cultural dialogue for consciousness raising and community building, with untapped transformative effects for individuals and their communities. Conversational snippets from dialogue with doctoral (postmaster's) students imbue these concepts with contextual details. Our students, who reflected on their internal growth struggles, are classroom educators and rising leaders in PK–12 public schools. Those who shared their comments with us had begun advancing into senior leadership positions, primarily as principals and school district leaders, including superintendents, across Texas and North Carolina.

We join the effort of bringing alive cultural dialogue in the social justice contexts of engagement, community, and transformation relative to the complex processes and effects that occur educationally and publicly. Situating our students and ourselves as cultural dialoguers, we adopt Brazilian educationalist Freire's (1972/2000) (1895–1975) concept of "dialoguer" but reorient it by adding "culture." Freire's meaning of "dialoguer" had a different purpose, we think, of underscoring a critical stance toward dominant, power-based interactions in which one party has the control, communication is one way, and social distance is perpetuated.

Cultural dialoguer spotlights generative possibilities for understanding human interaction and social justice advocacy. We think of this way of studying educational leadership as creative heuristics for which no formula exists and for which experience and reflection on one's own experience are essential to identifying problems and seeking solutions. Participants in this ongoing project are school leaders who educate pupils and teachers across the career spectrum. We tap a source of information for this writing that aided our graduate students' reflection because of the temporal distance it afforded them as completers of our courses. We relied on student volunteerism so we could sidestep the issue of teacher–student power dynamics commonly known to influence graded courses. This desire led us to elicit nongraded postcourse reflections from nonidentifying university students. The developing leaders who took our educational leadership courses—currently practicing leaders—studied multicultural relationships in a global society, cultural influences on American education, and proposal writing for the dissertation. Assuming a reflective stance on their coursework with us, they shared overarching statements that were consistent with our pedagogical goals; specifically, some of their professors productively examined positions on democratic issues from different perspectives, and they affirmed the value of contrarian positions and discourse as a way to interrogate beliefs. From their point of view, these same faculty members provided constructive balance for them, emphasizing that leaders have to act and be accountable for their actions. As we discuss here, these emancipatory goals and beliefs inform our teaching and raise the bar for educational leaders to evolve into culturally competent, responsible change agents. The notion of educational leader as a socially just force of accountability itself reflects the contradictions leaders must negotiate every day (see Mullen, Harris, Pryor, & Browne-Ferrigno, 2008).

The cultural dialogic orientation toward interaction between any individuals or groups, such as educational faculty and their students or school leaders and their teams, highlights the importance of relationships (Shields, 2004). US educational researcher Shields believes that relationship building is a vital part of transformative cultural dialogue:

> One of the central interventions of educational leaders must be the facilitation of moral dialogue. I propose that transformative leadership, based on dialogue and strong relationships, can provide opportunities for all children to learn in school communities that are socially just and deeply democratic. (pp. 110, 114)

We agree that "strong relationships" must be intentionally developed, which has implications for the teaching responsibilities of higher education faculty. We try to foster individually and collectively social justice advocacy in the university classroom and beyond. Our strategy of eliciting reflections on experiences of a socially just nature from course completers provided an opportunity for sense making of social justice issues for which we would not otherwise be privy.

We feel more convinced, based on insights gained from the written student comments and social justice literature that university students can productively develop into cultural dialoguers committed to social justice advocacy development. Moreover, by having to struggle with their own development and actions in a deeply personal way, they come to understand that relationships are not only central but also complicated. In fact, we think that their internal struggles with and negotiations of challenging conversation on personal, professional, and communal levels likely reflect their greatest learning curve. The feedback we received suggests that they are positioning themselves and others to make sense of situations in socially just ways for effecting change (Kasumagic, 2008; Kincheloe & Steinberg, 1998; Meath-Lang, 1993; Smyth, 2009). In educational leadership studies, scholars have written about difficult or complicated conversations, but few have staked out this area for its potency as a social justice agenda that has clear relevance for different populations in education (exceptions include Shields & Mohan, 2008; Shoho, Merchant, & Lugg, 2011).

Like activist–pedagogues Kasumagic (2008) and Meath-Lang (1993) and educational researchers Mirón, Bogotch, and Biesta (2001) and Taines (2012)—all of whom risked engagement in cultural discourse with youth from backgrounds of hardship—our writing speaks to passionate pedagogical work. Consistent with an essayist style, we are not presenting the results of classroom research conducted and reported elsewhere, or an assessment of the design, delivery, and effects of our course curriculum, or even a detailed description of our database of student comments. Instead, we refer, with partial and particular brushstrokes, to our multicase curricular interventions and classroom results in service of our larger ideas. As cultural dialoguers, we use a compass metaphor for orienting discourse about social (in)justices as leadership constructs and actions. We think that the educational leadership field could benefit from loosely construed, conceptual writing largely because it is in the early phases of social justice thinking and praxis.

Our compass construct—cultural dialogue as social justice praxis—has two directional needles: consciousness raising in educational spaces and social justice advocacy in schools, communities, and legislatures. We argue that meaningful cultural dialogue is vital for raising the awareness of educational stakeholders (e.g., leaders, educators, policymakers, parents, youth) whose actions influence their everyday social practices and advocacy in and beyond immediate workplaces. Our goal is for difficult conversations, integrated within social justice frameworks, to become part of leadership programs and professional development. We hope to see much more discourse on the subject of difficult cultural conversation within a changing global economy for the benefit of educational stakeholders and communities. Our dialogue, while partial and incomplete, can offer a starting point for exploration.

Cultural dialogue is itself partial and incomplete. The dialogic encounters we allude to seem to have fostered the potential of students for whom growth itself is a deep struggle, a constant negotiation, and an enduring commitment. Importantly, failed discourse involving social justice encounters has also been recorded in the literature, and we refer to several of these occasions. To us, the failed attempts are an inevitable part of social justice work that yields information for renewal. World-renowned Russian philosopher Bakhtin (cited in Morson & Emerson, 1990) (1895–1975) gives perspective on this subject, positioning difficult cultural discourse as inevitably partial and incomplete. He ascribed dialogue social value beyond being a communicative necessity, for it speaks to life, living, and the human condition. An inescapable necessity for catalyzing the potential of global citizens, difficult cultural conversation at the interactional level involves, in Bakhtin's words:

> provoking a specific answer that actualizes the potential, albeit in a particular and incomplete way. … the questioner necessarily undergoes the same process, which helps him comprehend unsuspected potentials in his own culture. The process … educates each side about

> itself and about the other, and it not only discovers but activates potential. Indeed, the process of dialogue may itself create new potentials, realizable only through future activity and dialogue. (as cited and translated in Morson & Emerson, 1990, p. 55)

Cultural dialogue involves risk, breakthrough, development, progress, failure, and momentum.

We next give more background to this multilayered conversation.

Background Context: Reorienting the Field's Compass

Educational Leadership Standards

In the USA, the compass for educational leadership preparation has been characterized as malfunctioning (English, 2003, 2011). A primary reason is that agencies external to universities and schools direct this work and without meaningful and purposeful discourse with stakeholders (e.g., educational leadership professors, teachers, parents). National policy boards and accrediting bodies decide educational missions and priorities for which unfairness and oppressive dynamics are associated and documented elsewhere (e.g., English, 2003, 2011). We wish to reiterate what English (2003) has persuasively argued—that the external compasses lack an appreciation for complexity, sensitivity to contextual realities, and legitimacy with respect to the claims (e.g., of generalizability) made.

Other educational researchers are concerned that high-stakes accountability standards reify expectations for homogeneity, uniformity, and conformity in university curriculum and performance outcomes (e.g., Bogotch, 2011; Shields, 2004). Standardized testing downplays the importance of learning that cannot be measured (English, Papa, Mullen, & Creighton, 2012) and defuses the efficacy of pedagogically centered approaches to learning and leadership that re-center schools to focus on high-quality learning and teaching and ways of organizing, leading, assessing, and integrating this work (Hollins, 2011). Viewed through the lens of critical liberation discourse, then, the validation of educational standards by "dominant organizational and business models that are not pedagogically grounded" (English et al., , p. 108) has a remedial, dehumanizing orientation toward difference and diversity. Negative repercussions have been known to ensue for the inherent worth and value of all children and youth, all who teach them, and disciplines outside math and science. High-stakes standards also seriously compromise the educative role of professors, relegating them not as subject expert, collaborative leaders but instead as tools for delivering behaviorist curriculum that is technical, organizational, and managerial (English et al., 2012; Kincheloe, 2004).

Banded in opposition to producing standard leaders for standard schools, we side with English's (2003) "cookie-cutter" critique. His provocation has made it more glaring to us just how much social justice is still a contested topic in the world of education. New compasses informed by constructive liberation critique would help articulate productive directions for the educational leadership field (Shoho et al., 2011). Orientations aimed at inclusiveness could give scholars and practitioners voice in making programmatic, curricular, and policymaking decisions. Their stakeholder groups, particularly pupils and others outside the majority culture, are in need of close attention, deep listening, and respect (Donmoyer & Kos, 1993; Mirón et al., 2001). We are intent on changing leadership preparation missions from outdated, if not oppressive, behaviorist ideas of schooling to socially just advocacy that empowers educators. At this time in the history of educational studies, we are able to adopt, as our taken-for-granted stance, the pushback social justice discourse (e.g., Bogotch, 2011; English, 2003, 2011; English et al., 2012; Shields, 2004). A growing cadre of school leaders is also resisting the takeover of education in their buildings (e.g., Theoharis, 2007).

Wanting to see the mission of leadership preparation uniformly become social justice oriented, then, we also seek renewal of the field. The idea is to make legitimate "alternative discourses" and new "ways to imagine possibilities for schools and school leadership" in educational leadership and university classrooms (Bogotch, 2011, p. 131; see also Donmoyer & Kos, 1993; English, 2003, 2011). These are generative sides of the complicated critique↔possibilities equation, so to speak. They force open spaces for imaginative pedagogical work that undergirds the liberation critiques. We are committed to helping aspiring leaders understand who they are and what they stand for and to building constructive leadership capacity within school communities that supports culturally responsive, networked learning spaces. Our scholarly activist agenda is oriented in this direction (see, e.g., Harris, 2009; Mullen et al., 2008). Such curricular interventions legitimize the development of prospective leaders as intentionally minded humanitarians who create contexts that enable inclusiveness, power sharing, community building, and democratic learning. Difficult cultural discourse as an ideal and as a practice is a purposeful catalyst for this social justice vision.

Social Justice Theories

Social justice pedagogues' writings on difficult conversation have influenced our discourse as educational leaders and the cultural discourse itself, which is cross-disciplinary and eclectic (e.g., Donmoyer & Kos, 1993; Meath-Lang, 1993; Mirón et al., 2001; Nixon et al., 2010; Shields & Mohan, 2008; Sue et al., 2010; Temple & Ylitalo, 2009). We join them by expressing our emancipatory goals with students and the dialogic reflections we elicited. Counternarratives appearing in leadership studies, as well as teacher education, psychology, and political science, have grown out of multicultural discourses. We think this direction holds promise for renewing and enriching leadership theory, practice, and policy and for re-centering the educational leadership field, in particular within universities and school communities.

A small group of academics in any discipline has construed *social justice* in various ways and leads dialogue about this concept beyond the early work in multiculturalism (e.g., Shields, 2004; Shoho et al., 2011). Across different disciplines, there is support for the notion that, in addition to principles that nourish the moral good (e.g., through such means as a leader's or group's principled decision making), interventions must occur deliberately and with sensitivity for communities to develop morally (Banks et al., 2005; Bogotch, 2002; Taines, 2012).

Widespread demographic changes in student populations have been influencing cultural communication for aspiring leaders in unique ways. In the USA, workplaces are rapidly becoming more diverse. The changing demography of public schooling is apparent, making cultural communication within heterogeneous contexts an existential necessity. Latinos and Asians are growing more than ten times the pace of White students, but Black and Latino students and their professional counterparts say they feel segregated; with 47 % of Americans classified as White, no clear racial or ethnic majority will exist by 2044, yet people in the changing global economy could feel increasingly isolated (King, 2005). Statistics, such as those previously mentioned, serve as a validation for the intentional development of socially just leaders in and for our educational communities. Based on 2007–2008 data from the National Center for Education Statistics (NCES), K–12 public schools are still being led by educators who are predominantly White (83 %), yet a majority–minority population (40.7 %) increasingly constitutes the student population (Feistritzer, 2010). Consequently, it is incumbent upon educators to establish learning environments where all students are valued and respected. Thus, educators themselves must have opportunities to engage in and understand cultural dialogue. Their dedication to social justice advocacy can create a more equitable society. Changing demographics bring to the surface the need for cultural dialogue to relate to a new majority that will be that much more impacted by "who is included in the circuits of communicative power and who is not" (Fraser, 2007, p. 25).

A foremost challenge of public schooling is for citizens of a new democracy to adjust and thrive, especially for those living in disenfranchised circumstances (Okun, 2010). As US leaders Banks et al. (2005), Bogotch (2002), Shoho et al. (2011), and Taines (2012) insist, social justice cannot simply be theorized at a distance—focused activity is needed for promoting a healthy citizenry in which youth and children are involved in creating their own destinies. Within socially just communities, such as graduate classrooms, students' internal compasses influence direction and redirection and reflection and postreflection. Students learn about culturally difficult discourse by exploring its meanings and practicing interchanges in safe contexts. They can be prepared to meaningfully address stakeholders' perspectives, include key parties in decision making, dissolve power-based monopolies, and establish communication across different communities (Allen, 2006; English, 2003; Fraser, 2007; Shields, 2004; Shoho et al., 2011; Taines, 2012). Thus, leaders effect justice through knowledge-informed action or praxis. Praxis occurs as people thoughtfully translate theories and principles by acting, and difficult cultural dialogue sets praxis in motion. Social justice compasses are praxis oriented.

Cultural Dialogue as Social Justice Praxis

Cultural dialogue, viewed as social justice praxis, is not only a necessary means for communication and connection among different people and cultures but also, as Freire, like Bakhtin, conceived, an "existential necessity" for life and living (Freire, 1972/2000). In the Freirian worldview, dialogic encounters have a profound impact on critical teaching theory for the larger purpose of ideally expressing people's respect and love for humanity, ultimately transforming the world into a better place.

Speaking to educators, Freire (1972/2000) used his lived experiences with peasants and urban laborers as a platform for urging teachers to transform social injustices into equitable and egalitarian conditions for all oppressed groups worldwide. Freire's advice was for every educator to intentionally use his or her power, position, and authority to teach for social justice by, notably, fostering critical conscious raising with students, the education profession, and the public. Pedagogical actions to this effect include proactively facilitating students' knowledge and action by modeling critical and rigorous thinking that forwards the creation of a liberated and just society that requires robust critique of the status quo and overpowering of the dulling effect that bureaucracies have on people. With intense conviction, Freire articulated the need for pedagogues (e.g., teachers) to come together with their students ("the oppressed" in the schooling context) to reflectively participate for the purpose of liberation:

> Critical and liberating dialogue, which presupposes action, must be carried on with the oppressed at whatever the stage of their struggle for liberation. The content of that dialogue can and should vary in accordance with historical conditions and the level at which the oppressed perceive reality. (p. 52)

By understanding their own oppression and acting in the world, students can be empowered to change horizontal, power-based relationships and structures through their complicated conversations with oppressed groups and emancipatory actions. Educators are called upon, in his vision for social justice, to use their classrooms for awakening their critical self-reflective consciousness and outwardly directing it by creating situations that enliven the social justice principles of fairness, inclusiveness, diversity, acceptance, and openness. Leaders, including policymakers, make desirable change possible by listening to a wide range of constituents to infuse communities with consciousness-raising agendas. Freire envisioned people who have institutional power immersing themselves in learning encounters with oppressed or disfranchised populations, such as families living in poverty and African American, Latino, and Native American students that are "socially, linguistically, and economically marginalized" (Kincheloe, 2004, p. 15). He also felt that powerful others should publicly represent the voices of such populations and propel social justice agendas.

Some critical theorists who teach graduate and undergraduate students have applied the Freirian principle of critical consciousness in their own leadership actions through dialogue. For example, Kincheloe (2004) describes experiences of teaching novice critical theorists to question the status quo transmitted through the formal curriculum. Illustrations include guiding graduate students to deconstruct the power embedded in a supervisor's expectation that the curriculum being taught reflect the official White male-centric version of great achievements. Breakthroughs in transformative learning can occur for students when educators make space for interrogative dialogue that leads to alternative versions and realities and different interpretations of history.

Menard-Warwick and Palmer's (2012) very different example comes from their teaching of prospective teachers in the state of Texas, USA, for whom cultural dialogue was primarily between the teacher aspirants and impoverished families living in Mexico and the students with their peers and professors. Lessons learned that extend the Freirian framework include the necessity for educators to explicitly prepare students for study abroad opportunities by helping them (1) to connect their experiences to a larger social context in their communications and (2) to become critically aware through guided instruction (described as "repeated, multimodal reflection," p. 136) on the culturally immersive experience. Students' dialogic encounters with families in Mexico fell short of these learning goals and of expectations for improved understanding of their home region of Texas where Mexican immigrants were struggling with hardship.

Consciousness raising is a Freirian necessity for educational activism, as next described. This process of transformation refers to a political–personal change in attitude on the part of not only individuals but also communities and countries. Inner change that is manifested in action is dependent not on the technical delivery of curriculum but rather on participatory dialogue that fosters new attitudes and civic outreach within schools and other communities (Freire, 1972/2000; Kasumagic, 2008).

Consciousness Raising in University Classrooms

Consciousness raising can be detected when a population shows evidence of a changed thought process that is more aligned with social justice. This indicates heightened sensitivity in the interpretation of and interaction in the world. The Freirian compass is attuned to the struggle of reading the world differently, in part by critiquing and affirming micro-interactions within public spaces generated into learning communities. We strongly feel that this work is in keeping with the promise of democracy through an intentional remapping of university curriculum.

As experienced teaching faculty whose graduate students are responsible for the development and inclusion of teachers, pupils, and others, we orient aspiring leaders and early career leaders toward their social justice development as engaged community leaders and citizens. We wonder, where is their consciousness-raising compass pointed with respect to social justice advocacy? For example, how do they make sense of cultural dialogue in the university classroom? And does their reflective learning suggest a commitment to community building in the graduate context and beyond with underserved student populations and disaffected parents?

Such questions reflect open-ended pedagogical goals. Our purpose is to raise, not pursue, them here as creative possibilities for future work and in service to readers' social justice inquiries. With such compasses in hand, we underscore social justice engagement as a work in progress at the level of the student, curriculum, classroom community, school community, and life experience. We think speculative questions like those posed may have deep relevance for student populations across different backgrounds, degree programs, disciplines, and grade levels worldwide. Recent literature from developing countries forges new worlds through intergenerational peace education with struggling youth, for example. Kasumagic's (2008) cultural dialogic essay is inspiring, for it involves a high degree of personal and political risk and deep communal momentum for social justice change.

As teaching faculty, we bring our belief compasses to class. We believe that a transformative liberation process can translate in university classrooms where professors and students together engage in critical self-reflection (Donmoyer & Kos, 1993; Meath-Lang, 1993; Menard-Warwick, & Palmer, 2012). We also share with our students that a culture of silence insulates race relations, gender identity, sexual orientation, religion, and more, which we think intensifies personal discomfort with dialogic encounters with peers. We ask for their patience, involvement, and persistence concerning difficult topics under discussion.

The work is not easy. In fact, our students shared feeling anxious, insecure, uncertain, and, in a few instances, even regret concerning some of what they had disclosed. Although they are experienced educators, many with administrative or leadership experience, they commonly profess to lacking knowledge of and skills in social justice leadership. They see it as new learning to be required to reflect on social justice concepts and situations and to express what they believe about social justice topics and the potential for better informed, and especially different, leadership actions.

In an effort to stimulate intentionally discourse that is both cultural and complicated, we assign Freire's (1972/2000) *Pedagogy of the Oppressed* as reading material before the first class. Students read it in its entirety, reflect on its ideas, and record their thoughts in a cultural communication journal (a graded assignment). They also react, in writing, to each class session, in effect participating in an ongoing dialogue in which they are enhancing one another's development. Because of this lead time in preparation and because we situate the students as cultural dialoguers and place them in small groups where reflective conversations flourish first, the discourse of difficult conversations more readily unfolds with the entire class.

We engage our students in cultural dialogue by inviting them to critically reflect on the assigned readings that include Freire's and others' works from multiple disciplines. (The readings we assign and that students select include the sources discussed and referenced herein.) We stimulate discussion with open-ended, lead questions, such as:

- As a school leader, your communication and interaction with others are the gateway for your stakeholders to figure out what you stand for and who you are as a leader, so what incident or concern are you dealing with that involves others' rights?
- What do your reactions communicate implicitly about your values, beliefs, and commitments?

- Do these values, beliefs, and commitments match your vision statement for the school or educational campus for which you work or lead?
- Why do you think that good people can become complicit in wrongdoing or silent even when they witness or know about wrongdoing?

No matter the lead questions asked, the postcourse comments that students submit as they provide evaluations for the class experience imply that the consciousness-raising dynamics around cultural dialogue are emotional, personal, and political, and while they elicit discomfort, the feelings of unease are a necessary part of meaningful conversations. The cultural discourse was seen as essential for producing the momentum for advocacy work in school communities. (We elaborate in the next sections.)

Self-Censorship–Openness Dynamic

Many of the students explicitly identified the emotions of anxiety and insecurity, as well as the contrasting emotions of calmness and safekeeping. Chubbuck and Zembylas (2008) of the USA and Cyprus, respectively, refer to such expression as "emotional ambivalence" in their work with teachers. Furthermore, our leadership students expressed concerns about being misunderstood, or even rejected, by community members regarding one's personal beliefs and positions about sensitive topics (e.g., race, sexual preference, religion, politics). As our students underscored, they were unaccustomed to cultural conversation in their professional roles and most or all other courses, which brings into question assumptions we hear about educational leaders and the knowledge they possess relative to social justice constructs. Thus, the experience of speaking honestly proved to be an "extremely difficult learning curve" for the majority of students. Some even admitted to censoring and silencing themselves at times.

Paradoxically, the students' sharing at the conclusion of the course seemed more complex than what they discussed during class sessions and wrote about in their journals. We think that the postcourse writing had educational value because it afforded them reflective distance, anonymity, and more advocacy stances or experiences to ponder. The improved quality of their disclosures suggested that consciousness raising continued past the course and that they were experiencing developmental gains in their leadership roles. One of our students disclosed postreflectively:

> My need to speak wholeheartedly was trumped by my own feelings of insecurity at times with my cohort. I came from a large district where we held gay educator support activities with a community that appeared uncomfortable with gay people *period*, much less gay educators. My openness was more apparent with my liberal professors, yet I felt silenced, not just as a lesbian, but as a student, teacher, and leader with the self-proclaimed conservative professors.

Students described a deep reservation about being completely transparent; they identified potential reasons for this emotion, ranging from personal boundaries and judgment calls to status quo expectations for group interaction, as well as socialized behaviors, for example:

> I shared in class to the extent I felt comfortable. I may not have shared every single view I held, but I shared those that seemed appropriate at the time. The constraints of polite conversation and desire not to offend people from other cultures did occasionally cause me to censor my comments.

We see internal growth struggles as giving momentum to social justice learning. Students who have completed social justice interventions on their campuses can better articulate their thoughts and the unresolved issues they may feel while opening up. Paradoxically, the willingness of group members to speak openly was a competing theme expressed in the comments we received. Students thought that intentionally "broaching the subject" of racism, religion, politics in education, and other social justice topics to get conversations under way within the diverse groups was important. Several expressed appreciation for being able to share their personal experiences as an ethnic minority member, self-identifying as African American. A crucial component of honest communication was alluded to: "Almost always, people prefaced their comments with an explanation of where they were coming from (how they formed their viewpoint; what baggage they were carrying), which gave us perspective before they made their comments." They wrote that this conversational strategy, which we modeled during classes, probably helped buffer responses that might have otherwise been volatile.

Such dynamics as conversational strategies enabled a climate for difficult cultural conversations to evolve, but the postcourse comments drew attention to how self-censorship and openness were in tension for many individuals, possibly competing forces with personal development itself. At a deeply personal level, participants in cultural dialogic situations may be in a sporadic or even prolonged state of stress, as the students revealed. We recognize more fully now that many of our students can be having an internal conversation that is at odds with or in conflict with the discourse they publicly generate. The postreflections suggest that students do not always express what they are feeling or thinking, which does not surprise us. Consciousness raising about these subtexts and nuances of discourse has implications for learning how to broker meaning making with groups. Gray areas of cultural discourse support our own consciousness-raising development as leaders of leaders who are learning alongside them and other social justice advocates.

Discomfort–Comfort Dynamic

Participation in complicated conversations forced our students to, as someone suggested, "look at the inequalities in society. Even if it is uncomfortable, we need to have open and frank discussions." The students mutually reinforced the message by engaging in dialogue that was "uncomfortable" and "difficult" and, importantly, recognizing that they and their professional colleagues "should embrace culturally difficult conversations, no matter the discomfort." Their consciousness raising made them critical of what they described as “menial conversations that lack substance,” the source of which some identified as their “lack of experience” in having social justice conversations. Many of them recognized in hindsight that “the implications of not having these conversations are grave.” One student rightly applauded Dr. Martin Luther King’s courage as an iconic civil rights activist in the USA, referencing his correspondence from a jail in Alabama: “‘We will have to repent in this generation not for the actions of bad people but the appalling silence of the good people,’” suggesting the belief some of the students came to embrace is that “good people” can be complicit in wrongdoing and “silent when they lack the skill and experience in difficult conversations.” The importance of engaging educational leadership students in doctoral programs through challenging cultural conversations to gain experience for sophisticated work in their vocational practices resonated as a new value for these adult learners.

Cultural discourse is not just about the content and delivery of social justice ideas, for it necessitates delicate risk taking for which a safe space is essential. A particularly salient insight that we highlighted at the beginning of the course is that people have to, paradoxically, seek a comfort level while feeling uncomfortable in order to internalize and better understand complicated feelings and issues. Other students agreed that “there aren’t many places that difficult cultural conversations can be raised” and, more specifically, that the university classroom can provide just such a space: “These classes were a safe environment where I was surrounded by people that I knew.” The majority of students stated that, because they felt safe, they were able to share their honest beliefs to a greater extent. Even so, someone self-describing as “open” and “brave” disclosed that she had nonetheless feared social repercussions: “There are times when I fear being seen as too liberal or conservative since I fall into both camps.” For her, silence was at times a politically safe harbor to which she retreated. Indeed, we can see much more clearly that the students found the cultural dialogues to be uncomfortable even when they had struck a chord of comfort. We are that much more convinced that these dialogues must be practiced more frequently in safe contexts that encourage risk taking, openness, and courage.

Meath-Lang (1993) articulated this high-risk challenge with penetrating precision. Having been intensively involved in cultural conversations with theater students, she insisted that:

> Dialogue is dangerous. It causes worry. It is approached, very often, with trepidation. One never knows what to expect when other people have the chance to talk. I have put myself at risk; in T. S. Eliot’s term, my universe could well be disrupted, my perceptions shattered. (p. 386)

In this quotation, the “I” belongs to her students who put themselves at risk to engage culturally with one another and whose worlds she was imagining they worry will have to change. In her analysis, comfort is attached to the status quo. Discomfort disturbs what is known and protected. The comments from our education students made us think more about the risks involved in candid disclosure for them. This often involves sparks discomfort, especially around topics of identity, community, and power for which the compass (i.e., orientation) and parameter (i.e., area) can be made known in advance but not the terrain (i.e., interpersonal dynamics).

Exposure–Immersion Dynamic

Regarding exposure, the idea universally expressed in the student commentaries is value for being in a shared space with others who are different from themselves. This is something that many educators and scholars may take for granted, yet we know that the mere configuration of a group wherein members see or learn about difference can be a significant step forward. With cultural dialogue, participants can test their assumptions, biases, and stereotypes by, to quote one student, "help[ing] one another discern between perceptions and realities of people, cultures, and religions." While some may experience breakthroughs in understandings, others, like this individual, benefit from being exposed to how people in the same profession think who may be a different race or have a different religion, sexual orientation, or lens for viewing the world:

> Quite honestly, I did not experience an enormous shift in my beliefs due to these conversations in class, but two things of value occurred for me. One, I was exposed to, and allowed to share in, the life-worlds of others who were unlike me but people I valued. This served to broaden my lens somewhat, so I could begin to empathize with them. That may or may not have changed my mind about a particular issue, but at least I learned that I could hear a different worldview and not be diminished by that hearing. Two, I was allowed to subject my worldview to differing opinions and gauge that which I believed was true against other facts and experiences. Whether I changed my thinking, at least my beliefs were based on broader "research." I believe that viewpoints that are not occasionally subjected to trial and opposition are weakly held.

Students shared that social justice topics that were important, relevant, and "of high interest" enabled them to become immersed in difficult conversations. Thus, they found it necessary "to offer a different viewpoint" if they were to voice their opinions. A student of color stated, "Others need to try and understand how we as African Americans [for example] feel and take off the rose-colored glasses." We believe that stating views and sharing perceptions enabled learning across race and other differences. Regarding their personal growth and learning, students felt it was "important for all of us to share in order to maximize learning from one another." As someone else emphasized, "[I would provide] my view and also learn about the views of other students in the class." Subjecting viewpoints to "trial and opposition" also forced the issue of participation in conversations that necessitated discomfort and emotional arousal.

Based on the individual student commentaries in postcourse reflections, we could discern almost universal consciousness raising reported by the groups (with exceptions where students felt the classroom dialogue did not allow room for their input). In a few cases, there were signs of critical consciousness, which Freire (1972/2000) explained is indicative of a deeper understanding of the world, extending to embrace of contradictions in educational, social, and political situations and for taking action to change oppressive elements. Critical consciousness, in particular, is crucial for disrupting cultures of silence and perpetuating counternarratives of social justice advocacy in schools, communities, and legislatures.

Social Justice Advocacy in School Communities, Countries, and Legislatures

Cultural dialogue within graduate classrooms and beyond has serious implications for school communities, countries, and legislatures. In the context of this bigger picture, we raise starting points for in-depth discussion.

Signs indicate that some developing leaders radiate the promise of a social justice center or axis. As they produce changes within their communities and schools, social justice advocates resist educational inequities, enact resistance, and use policy advocacy to achieve social justice ends. We can see some compatibility between our students and the practicing school principals that US educational researcher Theoharis (2007) described as possessing strong social justice compasses. He believes that principals can show a policy advocacy orientation through, for example, such school community actions as resisting "all tracking or segregation models" as "not only a pedagogical or learning shift but also a moral act" (p. 234). Attuned as social justice leaders, the principals he studied were openly against deficit thinking about pupils from diverse backgrounds. Praxis driven, they intentionally brought about "changes in structure as a result of their beliefs (e.g., creating heterogeneous and inclusive programs)," thereby positioning "traditionally marginalized students' failure … as an inherent result of an unjust system" (Theoharis, p. 235). Resonating with these leadership actions, we want for the developing leaders who study with us to feel uniformly inspired to enact their social justice beliefs with clarity, fervor, and force.

Theoharis (2007) has challenged school leaders to transform their communities with schoolwide structural changes, which requires knowledge of legislation that affects human rights. Similarly, Bogotch's (2011) challenge to educational leaders is to use "pedagogical power collectively" to develop "a learning-to-learn leadership context that extends outwards, inside and out of school settings" (p. 135). A few of our students explicitly addressed their current work in policy advocacy with respect to the right to equal educational opportunity. One took up the disconcerting eruption of segregation and resegregation practices in some US states:

> Analyzing current trends in segregation has made me realize that this is a very serious civil rights issue. I've decided to fight the dissolution of diversity policies in my district and the resegregation of our neighborhoods with constituents who are caving into racial discrimination—in my school and district we've taken a public stance against school board discriminatory practices. We're debating county officials in public meetings. I'm a protester in the news.

We think the idea of a socially just leader can be taken to the next level of a socially just community and, with greater vision, a socially just country and global community. In their post-reflective commentaries, our students spoke about honoring certain tenets that foster difficult conversation with stakeholder groups, knowing that they are being called upon to address "an under-the-surface need."

The awareness shown by one of our students, a White school superintendent, is particularly noteworthy, in part because of the power she holds in her leadership of a large urban district. For 2 years while studying with us, she had been leading the school board in her district before realizing that the African American members, who were parents, were silently feeling alienated and perhaps misunderstood. Due to an increase in cultural sensitivity attributed by her to the dialogic interventions in her university coursework, she could now:

> see the distress in their eyes as they heard the annual accountability report and the achievement gaps highlighted. I am now acutely aware of how these members feel as children of color underachieve while our efforts [as leaders] to recruit minority teachers are only marginally successful.

Consciousness raising about issues of race, inclusion, and policy within dominant cultures of schooling carried over into this real-world context for which democracy in action had been internalized by our former student. Positioning herself as a cultural dialoguer, this superintendent committed to holding "discussions with school leaders and minority members about how to close [the achievement] gap this school year." Such ruminations are suggestive of the kinds of actions that developing leaders can take for creating a socially just community. Consciousness raising involves the interrogation of long-held assumptions and entrenched patterns of apathy, indifference, or inaction while recovering hope and optimism. Like this superintendent, other leaders have risen to the call to include nondominant populations in conversations about schooling on campuses.

Empirical case illustrations from the leadership literature help make this point. Mirón et al. (2001) explored students' perspectives on their personal schooling experiences through cultural conversations. The researchers created an opportunity to have dialogic encounters with African American youth in US inner-city high schools. This countercultural work gave the students openings for authentic personal↔political dialogue with adults who were not their teachers. Initiating a metadialogue about students' constructions of morality (around such uncomfortable topics as feelings and sources of discomfort), the researchers empowered African American adolescents to construct, on their own terms, cultural knowledge as they live it. As one strain of discourse, students revealed deep relational concerns about problematic dynamics involving powerful others, particularly teachers. In the Taines (2012) study, urban and suburban youth engaged in face-to-face discourse about the educational conditions of schooling they personally experienced, to compare the quality of resources, relationships, and systems, and to "interrogate" the privilege of suburban schooling while wrestling with ways to productively improve schooling for urban youth.

The real-world struggles inherent in such stories forward the mission that authenticates challenging conversation for different communities. Communities assert their sense of power or authority in part by creating safe spaces for cultural experiences to become known and acted upon with sensitivity. Poor-quality education and inequities, exclusion and alienation experienced by the youth at the inner-city schools, and poignant realities conveyed in both the Mirón et al. and Taines' studies framed the next steps for leadership action. The researchers addressed school practitioners, policymakers, and the public about startling inequities and disparities structurally ingrained within public education for minority and poor youth. Learning about these dynamics in acute interpersonal, discovery ways, students dialogue with researchers or peers in different circumstances. Transformative encounters enable meaning to be made of schooling conditions beyond one's insulated personal circumstances. For adults and activists, the emerging dialogue confronts the ideological rhetoric that dominates academic and policy discourse. The idea for a transformative education is that it takes personal dialogic encounters, like those described in this chapter, for revelatory momentum that redirects the compass of communities toward equitable and egalitarian conditions of schooling for impoverished and disadvantaged youth in the USA as well as globally. Thus, campus leaders should access students' perspectives to purposefully guide (and interrogate) adult mindsets and the school curriculum and policy.

Unlike the adolescents in the Mirón et al. (2001) and Taines (2012) studies, our students are adult leaders of high schools, middle schools, and elementary schools, as well as central office administrators at the district level. They are responsible for youth within their charge for which dialogic-oriented studies of urban and suburban contexts have deep value. The leaders we teach see it as their life's work to empower all students, especially those who are culturally disadvantaged; through our curricular interventions, they may be more apt to value meaningful cultural discourse for all school populations. We realize that the social justice consciousness we have broached reflects early development, with unevenness evident also through praxis, where the students were either uncertain of next steps in their daily work life or had already created conditions for furthering political discourse and community empowerment. These developing leaders have expressed pressing tensions and fears about open dialogue and potential risks, namely, personal alienation in their roles.

The risks are exacerbated when cultural dialogue is with youth from inner-city, high-minority schools (Mirón et al., 2001; Taines, 2012) and war-torn, developing countries (Kasumagic, 2008). Purposeful curricular interactions with high-need populations are vital for attaining social justice goals. Given that the nature of the engagement necessitates high-risk conversations, we must also consider the participants' psychosocial development and intentionally work to protect adolescent identity development. Researchers are exploring how adult educators can develop into strong social justice advocates of youth through such actions as maintaining confidentiality about students' backgrounds and lives (Mirón et al.).

On the horizon of social justice advocacy in school communities, countries, and legislatures is the power of cultural dialogue on a larger scale. At these levels, cultural dialogue can engage all parties inwardly and outwardly for tackling such problems as societal discrimination and such possibilities as civic engagement.

Such on-the-ground activism, complete with theorized interventions, school-based encounters, and contextually informed results (e.g., Mirón et al., 2001; Shields & Mohan, 2008), sporadically appears in educational leadership discourse as well. We agree with Shields (2004) that preparing school practitioners as social justice leaders helps position them to have a strong philosophical–political orientation in their life's work. This orientation is undergirded by what she recognizes as a "just, democratic, empathetic, and optimistic" sensibility (p. 125). A goal of this work is to influence educators' discourse about schooling, democracy, curriculum, and change so they can affect the lives of children, youth, and adults (Mirón et al., 2001).

Such examples of difficult cultural dialogue bring praxis to life. Freire (1972/2000) wrote that praxis is theory-informed action; not value-free or conceptual only, praxis is, instead, value driven and change oriented. A goal of praxis is to make a difference in a way that is informed by and informs theory. To explain, a primary concern with achieving justice in society requires praxis, which necessitates that participants fuse theory and practice as pragmatic theorists, that is, cultural dialoguers. Shields and Mohan's (2008) evocative portrait conveys how challenging praxis can be. In a public school in the USA, teachers and school leaders present at a workshop found the ideas of creating culturally inclusive learning communities that address cultural and ethnic difference for children to be less pressing than accountability demands from the state.

Cultural dialogue does not always work or it can be left undetermined at the time—these are different realities of and outcomes for social justice. Social justice agendas can be abruptly circumvented, forced to take a backseat to school tests or any other competing agenda, such as the comfort or protection afforded by menial conversation, as several students of ours noted. Democratic community building suffers when the leaders of them acquiesce to constructing mentally resistant fortresses that seal off social justice agendas. We can see from our own courses that this is a steep climb for educators, given the narrow-minded praxis they must demonstrate on school-level test performance, making social justice advocacy seem distracting.

Pushing from the other direction, teachers and young people alike express concern about deficit thinking. They feel stigmatized by characterizations of their schools and neighborhoods as poor, underserved, and less than that of affluent school communities, as Shields (2004) attests. With reference to a compass in education (the *Publication Manual of American Psychological Association* [APA], 6th edition, 2010), this field has guidelines for reducing bias in language and perception. Labeling is pervasive and it distorts and misrepresents. Labels, such as *disenfranchised populations*, function at different levels as socially unacceptable realities and space-saving signifiers (APA, pp. 71–73). There is a fine line between wanting to change socially unjust thinking and unintentionally perpetuating it. We see it as an important challenge for researchers not just to examine their personal biases and constructions of citizens (e.g., practicing leaders), as Theoharis's (2007) self-referential scholarship accomplishes, but to extend outward as a profession and discipline.

Relationally experienced dialogue with school constituents, whether teachers, leaders, youth, or parents, repositions praxis—it becomes two-way learning. Shoho and colleagues (2011) asserted that it is the school's responsibility "to engage school leaders in a meaningful dialogue on social justice issues" (p. 37). We think that higher education as a domain, and university faculties in particular, has the responsibility to make this kind of dialogue happen with and on behalf of school practitioners and other stakeholders. A goal is to enlarge the sphere of responsibility that prepares educators so that school practitioners can feel more efficacious about leading and participating in difficult conversations across contexts. Complicated dialogue is challenging for many reasons, including the fact that it is "central to the task of educational leadership" and is associated with "a way of being," not simply better communication (Shields, 2004, p. 115). Temple and Ylitalo (2009) also see universities as "places of possibility" and thus seek to involve their higher education populations "in social and cultural change" by using critical dialogue to surface "underlying assumptions about cultural and ethnic diversity" (p. 278).

From our advocacy positions as educational leaders whose life's work is in public spaces, we believe that social justice in action has global promise as a catalyst for a democratic ideology where it energizes meaningful, cross-cultural dialogue and fosters change. We think a "common language" of social justice along the lines that Shoho et al. (2011) raised could support a consensual framework and guiding principles in a profession that has a much more advanced justice-oriented advocacy mindset than ours currently does, so we worry that premature efforts in this direction could perpetuate unexpected deficit thinking. Labeling could take over, nuance compressed, and voices censored or left out. We understand that social justice has widely varied meanings (Temple & Ylitalo, 2009), but this also makes it that much more attractive to us in that a common language cannot possibly reflect such different cultural and historic contexts.

Unlike critical studies, sociology, and other fields, educational leadership and administration has only more recently encountered critical and transformative consciousness around its own conservative, segregator, and alienating practices (Shoho et al., 2011). We professors of educational leadership are spurring one another on to uncover cultural hegemonic values that reflect the taken-for-granted values and beliefs of ruling classes (e.g., district superintendents) within culturally diverse societies (e.g., school districts), and we are seeking productive ways to do this within our own pedagogies, theorizing, and research.

Such dialogic encounters reveal just how rough the edges are of social justice advocacy. These also reveal how real and tangible the discomfort can be for educators both in difficult cultural conversations and at the ground level who must contend with different and contradictory expectations about what is best for children. Nonetheless, all leaders must rise to the occasion of problematizing power-laden schooling. We can take emotional sustenance from our graduate students who are practicing educators in high-poverty public schools facing the relentless accountability pressures of high-stakes testing, severe budget cuts, and personnel turnover.

Turning Social Justice Compasses Outward

Through our stories, we come to know how university classrooms and schools play a central role in developing the consciousness of new generations of leaders and citizens. Professors of education, for example, in many cases deliberately foster learning inside and outside universities for the active creation of social democracies that enable all children and youth, especially those who are marginalized or less fortunate, to have enriching, lifelong opportunities (Kincheloe & Steinberg, 1998; Mirón et al., 2001; Shields, 2004; Shields & Mohan, 2008).

Out of our "everyday activities" with school practitioners and their struggles, "new leadership theories [are] discovered" through such processes as building "cultures of inquiry" and motivating, mentoring, and role modeling (Bogotch, 2011, p. 133). Passionately engaged, we feel energized by the clamor and chaos of schools and other educational places. Some of us are living the cautionary tale of just how hard this work can be and how rewarding it is. Social justice work can productively expose dynamics of cultural dominance and separation by educators throughout a system who mirror paternalistic, indifferent, and apathetic behaviors (Reed, 2004; Shields & Mohan, 2008). A critically reflective lens can expose what social injustices look like in practice and what advocacy alternatives can be imagined or produced.

This takes us to critical theorist Reed's (2004) story of social injustice concerning low-income areas where some citizens already distrust institutions based on negative experiences. At several American schools he observed, principals and teachers exhibited a "fortress mentality" in their dialogue over (not with) parents in various assemblies. He witnessed the school-based leaders dominating and silencing parents by using a distant tone, that of the uninterested outsider. Moreover, they had cast blame for youth violence and, by way of implication, came across as apathetic in those public spaces about the loss and trauma of several families, in effect deepening the school–neighborhood divide. Based on his observations, Reed wondered what the educators had been learning in their university programs. To paraphrase, why had they not exhibited social justice dispositions, such as empathy, sensitivity, and connectedness, through the facilitation of meaningful conversation and authentic listening? Why had they failed to come through as morally attuned, cultural pedagogues who know how to cultivate dialogic equality with parents?

Leaders like those in Reed's (2004) account seem like socially distant spectators not engaged in the complex process of schooling and the role of complicated discourse in it. In contrast, activists like those in Theoharis's (2007) account had learned to reorient their compasses by inwardly transforming, having meaningful encounters with citizens of lesser social standing, and releasing human vitality through democratic conditions of learning. The Freirian worldview involves confronting paternalism, power, and inequity in relationships, practices, and policies by using one's moral compass while in relation to others, whether parents or others.

We think it is liberating for dialogue to be embraced in pedagogical contexts not only as a tool for educational learning and discovery but, moreover, an aesthetic for advancing democracy. Critical theorists Kincheloe and Steinberg (1998) would passionately argue that such breakthrough ideas about dialogue deeply influence education. As previously mentioned about Kincheloe's (2004) reflection on teaching, together they positioned their graduate students as "thinking educators" of practice by placing explicit value on dialogic encounters that help them to actualize the growth in their social environments. "Set[ting] the stage for a long-running, meta-dialogue" that extends beyond the university classroom, Kincheloe and Steinberg's students were guided to enact Freirian conditions for an "inner conversation" in their school communities that redefines "their images of both self and world" (p. 16). Conversation occurs, then, with the self, with the other, in the community, and within one's field.

The actual encounter is the dialogic imperative that accesses how practitioners, youth, parents, and others think. Such work provides an opportunity for promoting moral leadership through listening to others and taking action (Mirón et al., 2001). When we listen to others, students become reconstituted in school life as a contributor to education and global citizenry.

Next steps beyond raising critical consciousness in the classroom and education leadership field involve acting on cultural dialogue as social justice praxis. Educators are becoming oriented to this work through the concept and practice of pedagogically centered leadership. Teachers, leaders, and other educators dialogue in ways that are collegial and in spaces intentionally redesigned to make schooling less hierarchical and bureaucratized in an effort to foster pedagogically centered leadership. This social justice framework, US teacher educator Hollins's (2011) explains, shines light on pedagogically enriched teaching and learning, group cohesion, and collegial learning. We contend that meaningful, critical conversation is the nexus for fostering professional identity, growth and development, professional learning community, and collaboration. In order to improve learning for students and their circumstances, educators must themselves commit as cultural dialoguers to pedagogically centered learning and leadership; they work with other leaders to, for example, combat the managerial takeover of schools, eliminate test score obsessiveness, and foster healthy and humane educational environments that benefit all participants in the schooling enterprise (English et al., 2012).

More specifically, pedagogically centered leadership is, at the level of praxis, a compass for reorienting teaching and learning to emphasize knowledge, learning, communication, pedagogy, assessment, and integration with curriculum. With regard to each of these components, pedagogically centered leaders foster "knowledge of how humans grow and develop, which includes group-based development and cultural differences in the home and family"; develop "an intensive understanding about the learning process itself and how that understanding can be employed to enhance learning"; participate in extending the "knowledge of discipline and domain-specific conceptual patterns and how they inform the discourse in those disciplines"; connect "specific pedagogical practices [with] specific theoretical perspectives … to attain immediate and longer-term learning outcomes"; use "a variety of assessment strategies to evaluate pedagogical practices," including "authentic assessment models"; and work toward integrating all of these efforts "to the creation of the common core curriculum standards currently being developed" (English et al., 2012, pp. 105–106).

These cultural learning components for PK–12 schools overlap with the university domain. Increasingly, professors must model what teachers and leaders need to know, model, and be able to do. In order to confront and change managerial mindsets about learning and teaching that infuse higher education institutions, educators in all systems are being challenged to facilitate opportunities for cultural dialogic encounters, as we have described.

Expanding Platforms for Cultivating Cultural Discourse

Educators are gradually developing new platforms for cultivating cultural discourse and articulating ideas that educators can take seriously as part of their curriculum and life's work. As described, there are inspirational examples from the education literature of pedagogues who are acting on the promise of local and global transformation for bettering their communities. Readers can find sustenance in written accounts that narrate the strengths and shortcomings involved in the work of fostering generative cultural discourse that helps students to express themselves in cultural terms and to do the courageous work of social justice pedagogues.

After concluding this inquiry, our pedagogical learning in leadership preparation reinforces the message that students can reflect more deeply in class and through culturally immersive assignments and that the learning continues for them as developing leaders. We are trying to become more comfortable with the reality that our social justice interventions and the effect of them are incomplete and unknown to a large degree. We now better understand that engaging in difficult cultural conversations within a classroom that is simultaneously a public forum constitutes an ongoing struggle on different levels for our students and ourselves as part of a steep learning curve.

Finally, we see this chapter as our ethical responsibility to help extend the pedagogy of a democratic theory in action by communicating with audiences around the world. We want to learn from people in different countries about their ideas of dialogue, consciousness raising, and community for the benefit of stakeholders such as leaders and educators, youth, and pupils. We believe a measure of overall community health is for professors to model engagement with public educators and to join forces that link private and public platforms of social justice for wide benefit. As we talk to one another, the world changes.

Talking across cultural differences of race, gender, class, and more is a form of activism. While societal problems like poverty, racism, sexism, homophobia, and persecution are concrete struggles of human plight around the world, people have the power to change what only appears fixed—identities, structures, and beliefs are malleable. By intervening with intentionality and alongside others, we move past social justice rhetoric, as well as our own sense of hopelessness and fear, to effect significant change in and beyond our lifeworlds. Difficult cultural discourse helps citizens to understand the inner power they have to unmake and remake the world. A positive attitude about the future probably serves as the best catalyst for engaging in this challenging creative work.

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Chapter 58

Beyond the Colorblind Perspective: Centering Issues of Race and Culture in Leadership Preparation Programs in Britain and the United States

Lauri Johnson and Rosemary Campbell-Stephens

Calls for leadership preparation programs to develop leadership for social justice abound in the US educational literature. Yet to date there are few guidelines about how to reform leadership preparation programs to develop the capacities needed for social justice leaders or study in depth those programs which have reorganized to implement a socially just approach (Furman, 2012). In a comprehensive review of 72 articles and book chapters on leadership for social justice, Capper, Theoharis, and Sebastian (2006) identified only 11 articles that offered explicit suggestions for changes to leadership preparation programs. Capper et al. proposed a framework for leadership preparation for social justice that incorporates (1) the development of a *critical consciousness* of power relations and systematic inequalities such as White privilege, heterosexism, poverty, misogyny, and ethnocentrism; (2) *knowledge* of evidence-based practices that can create an equitable school; and (3) specific *skills* that leaders require to enact justice in their schools such as establishing a service delivery team to eliminate pullout programs (p. 213). In their model these three elements intersect with revisions in the curriculum, pedagogy, and assessment in ways that enable future school leaders to become "change agents for difference" (p. 215). In turn, McKenzie et al. (2008) proposed a leadership preparation program for social justice that focuses on academic achievement, critical consciousness, and inclusive practices. In their model aspiring social justice leaders must learn how to raise the academic achievement of all students in the school, teach students to live as critical citizens in society, and ensure that students learn in heterogeneous, inclusive classrooms. Their view of critical consciousness envisions citizens who critique society to

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"ensure that schools are safe places for all children" (p. 122). McKenzie et al. also advocate proactive systems of support that enable school leaders to establish a professional development system that maximizes learning for all students.

Despite these two comprehensive proposed models, leadership preparation programs lack a clear focus on how aspiring school leaders might develop an awareness of race and culture and the role they play in their own and their students' lives. In the early 1990s Parker and Shapiro (1992) noted the omission of conversations on race and gender in graduate programs of educational administration. With few exceptions, little has changed today – it continues to be difficult for educational leadership faculty to talk about race and incorporate culturally specific curriculum in their courses. Leadership preparation programs in the United States often maintain a colorblind perspective when analyzing school organizations as well as aspiring leaders' racial identities and leadership approaches (see Rusch, 2004; Rusch & Horsford, 2009; Young & Brooks, 2008). This "difference blindness" (Larson & Ovando, 2001) ignores systematic inequities and suggests that individual deficiencies account for the problems of entire social groups (Tarca, 2005).

In Britain the literature about school leaders of color, most of which has been produced in the last 10 years, could be characterized as barrier research which is focused on documenting the shortage of Black and Minority Ethnic (BME)[1] educators and their failure to progress into senior leadership positions. Recent efforts to diversify school leadership in Britain are often tied to succession planning as impending retirements, along with perceptions of the difficulty of the job, and a long apprenticeship (often 20 years as teachers and deputy heads) has led to a shortage of headteachers just as British schools are becoming increasingly racially and culturally diverse.[2] In the National College for School Leadership's[3] campaign on succession planning, Bush (2011) notes that "the diversity aspect has been the least successful" and that discourse about the need for more Black and Minority Ethnic (BME) leaders is nonexistent or marginalized in many local educational authorities (p. 191). In Britain there has been little discussion about social justice-oriented leadership development because transformational and distributed leadership approaches tend to dominate and homogenize the field (Lumby, 2006). Missing from the British literature are studies that examine the leadership philosophies and practices of Black headteachers and other school leaders of color as well as leadership preparation programs that might help nurture and support these perspectives.

This colorblind approach (Mabokela & Madsen, 2003; Schofield, 1997) to leadership preparation, where leadership theories, practices, and curriculum are viewed as neutral and free of cultural perspectives and beliefs, characterizes aspiring school leaders as a "homogeneous group where what they do matters more than who they are" (Lumby, 2010, p. 2). This approach to school leadership extends beyond the USA and Britain to other national contexts as well. In a recent comparative study between a racially diverse English and South African school, Lumby and Heystek (2012) found that White leaders at both schools ignored issues of race and that recent dramatic demographic changes appeared to have little impact on how the leaders viewed themselves and exclusionary practices in their schools. The authors conclude that leadership development programs should encourage aspiring leaders to reflect on their identities.

Drawing on examples from both Britain and the United States, in this chapter we identify critical elements in a race-conscious and diversity responsiveness approach to leadership preparation for both aspiring leaders of color and White leaders that aims to go beyond the colorblind approach, develop a critical consciousness about issues of race and identity, and promote new leadership approaches that consider the importance of culture and context. From Britain, we describe curriculum examples and leadership perspectives evidenced in a study of the *Investing in Diversity* program, a Black-led leadership development program developed in 2004 by Rosemary Campbell-Stephens to address the underrepresentation of Black headteachers and middle-level leaders in the London schools (Johnson & Campbell-Stephens, 2010).

From the United States, we draw from the small but growing literature on how White educators might learn to go beyond the colorblind perspective and come to understand themselves and their students as racial beings (Johnson, 2002; Sleeter, 2008; Teel & Obidah, 2008; Ullucci & Battey, 2011). Ebert (2004) notes that color blindness rests on the belief of equal opportunity for all, regardless of race, and that pervasive *individual* deficiencies account for the problems of entire social groups (p. 175). While this blindness to difference and lack of collective response can serve to reinforce racism (Tarca, 2005), White educators often believe just the opposite – that to “see” race is to be racist. Studies that document how White educators become racially conscious focus on their firsthand knowledge of diversity as a lived experience, their developing understanding of insider’s perspectives on race and racism, and self reflection on their own privilege (Theoharis & Haddix, 2011).

While much of the literature on color blindness arises from studies of teacher education, we apply these findings to educational leadership preparation to suggest how aspiring school leaders, including those White leaders who predominate in leadership preparation programs, might learn to become color conscious and critique and challenge the status quo of unequal practices based on race.

Lessons from *Investing in Diversity*

The London Context

With a population of almost eight million, London is one of the largest cities in Europe and has emerged in the twenty-first century as a global city of unprecedented diversity. Migration to the UK is at record levels (Travis, 2012). More than 300 home languages are spoken in the London schools and 67 % of secondary school students are students of color (“Ethnic Minority Pupils Increase by 57 % in a Decade,” 2011). From the first immigrants who came from the Caribbean in the late 1940s, Britain’s Black population has grown to 3.5 % of the total British population and 11 % of the London population. The Black population in the schools is higher, with 17 % of the students in the Inner London schools of African origin and

11 % of Caribbean background. British Asians of Indian, Pakistani, and Bangladeshi descent represent 13 % of the London population. Some inner London boroughs like Newham and Tower Hamlets are over 30 % Asian (Rogers, 2011).

London is also a city of vast disparities between the rich and the poor and a continuing racial and ethnic achievement gap. The achievement of African Caribbean, racially mixed children (White and Black Caribbean), Pakistani, and traveller/Roma students falls in the bottom quartile of that gap (Department for Education [DfE], 2012b). Young Black males have been particularly affected by these disparities. The London Development Agency has described the situation facing African Caribbean boys in the London educational system as "catastrophic" (London Development Agency [LDA], 2004). In the face of the recent recession, long-term youth employment in Britain is the highest in a generation, with the unemployment rate for young Black men at 55.9 % (Ball, 2012).

Despite the growing diversity in London schools, Black and Minority Ethnic (BME) teachers are greatly underrepresented and the city has the largest gap (37 % in Inner London and 24 % in Outer London) between the proportion of pupils and the proportion of teachers from a minority ethnic group (Department for Education and Skills, 2006). The latest Department of Education's School Workforce Census indicates that while BME teachers have increased from 3.8 % in 2004 to 5.4 % in 2010, only 2.4 % of headteachers are from a Black and Ethnic minority background (DfE, 2011). Government statistics show that BME teachers are much less likely to be promoted to leadership positions than White teachers (Powney et al., 2003). Black male headteachers in England's 21,600 state schools number just 30, a fact which has led both university researchers and community leaders to characterize the lack of Black and other educators of color in leadership positions as institutional racism (Bush, 2011; Shepard, 2011).

The Investing in Diversity Program

Investing in Diversity operated from 2004 to 2011 as a "bespoke" leadership development program for Black and Global Majority educators[4] designed to change the "face and heart of leadership" in London (Campbell-Stephens, 2009, p. 322). The program was sponsored by the London Centre for Leadership in Learning, a faculty within the Institute of Education at the University of London. Funding was provided through the London Challenge (now termed City Challenge) to improve educational outcomes for students with a particular emphasis on the "challenges" present in urban contexts. *Investing in Diversity* encouraged Black and Global Majority educators to embrace the "additionality" they bring to their leadership (Campbell-Stephens, 2009).

Participants

Over 1,000 teachers of color completed the program. Participants were predominately Black (69 %) of African Caribbean (36 %), African (24 %), or Black British (9 %) background. However, South Asians (of Indian, Pakistani, or Bangladeshi background) were also recruited and made up another 20 % of the participants. The remaining 11 % of program participants were racially mixed (Black White or Asian White). In general, participants in the *Investing* program were teachers who were applying for their first leadership position as middle-level leaders. While program participants represented all 33 local authorities in London, many were from neighborhoods that enrolled high percentages of students of color (e.g., Waltham Forest, Tower Hamlets, and Newham; London Centre for Leadership in Learning, 2007).

The Program Curriculum

The *Investing in Diversity* program was organized over a 12-month period, beginning with a residential weekend and followed by ten after school or "twilight" sessions and a whole-day seminar at the end of the year. Every residential weekend began with an inspirational keynote address about the ongoing struggles of Black teachers, parents, and community members for equity and social justice in Britain presented by Professor Gus John, the first Black Director of Education in the country and a longtime African Caribbean community activist who has been at the forefront of equal rights and racial politics in Britain for more than 30 years (John, 2009). During the weekend residential participants engaged in consciousness-raising activities that challenged participants to explore what Black educators bring to leadership. The twilight sessions included ten modules throughout the school year on topics such as moral purpose, data analysis, finance, leading teams, leading innovation in learning, and school improvement. The focus in these modules was not just about learning the skills and abilities necessary to be an effective school leader but to develop a critical consciousness amongst the participants by questioning how specific policies and practices might affect groups of students who have traditionally been failed by the British education system. For instance, students studied the origins and effects of the racial achievement gap for African Caribbean boys in the London schools and critiqued the government's Contextual Value Added measures (CVA)[5] which are built on the premise that academic progress for racially and ethnically diverse groups will innately be slower than those of their peers.

Perspectives on Leadership

All of the instructors or "master tutors" in the *Investing in Diversity* program were leaders of African Caribbean, African, or South Asian descent, mainly senior school leaders but also professionals from business and other sectors such as the criminal justice system. Instructors were selected for both their expertise in the subject area they teach and their consciousness about diversity issues and the Black experience. They were encouraged to bring their perspectives and lived experiences as Black leaders to the classroom.[6] While *Investing in Diversity* was grounded in a political and historical mandate to prepare "conscious" Black leaders, the program did not essentialize Black leadership approaches. As Campbell-Stephens (2009) notes, "the intention was to create an intellectual/practitioner space for aspiring Black leaders to discover, define and refine their craft" (p. 323). By hiring Black instructors from a variety of school settings and political perspectives, the program modeled that "there's no one way to be Black" (Johnson & Campbell-Stephens, 2010).

Preliminary themes identified in the leadership philosophies promoted in the program include the importance of moral purpose, the need for cultural awareness or cultural literacy, and the development of high expectations and a sense of responsibility for Black students.

Moral Purpose

Introduced by Rosemary Campbell-Stephens in the weekend residential and then taken up in the first twilight session, participants were asked to reflect on their moral purpose because, in Rosemary's words, "your moral purpose (or lack of it) speaks directly to who you are and what you stand for as an educator" (Portelli & Campbell-Stephens, 2009, p. 16). Although moral purpose is not an uncommon topic in traditional leadership preparation programs in Britain, it often gets reduced to the "lowest common denominator in terms of raising the bar and narrowing the (achievement) gap" (Portelli & Campbell-Stephens, p. 17).

In *Investing in Diversity* moral purpose was infused with a focus on equity and justice issues to advocate for those students who have been marginalized in British schools. It is the lens that the participants were asked to use to analyze their day-to-day decisions as a school leader. As the course progressed throughout the year, participants were questioned, "What does your moral purpose look like when you do data analysis? When you decide how to use your finances? Manage staff?"

Cultural Awareness and Cultural Literacy

Investing in Diversity stressed the importance of Black educators understanding that culture informs who they are and provides a lens through which they see the world. Developing cultural awareness or cultural literacy goes beyond integrating multicultural curriculum into classrooms but also includes how school leaders bring their personal culture into the school. As Ivy Braithwaite, one of the lead instructors in the program and a headteacher in North London, puts it, "it's about my ancestors, my grandparents and my parents and what they've been put through. Cultural awareness is walking tall and representing my community" (Johnson & Campbell-Stephens, 2010, p. 861).

The focus on culture in *Investing in Diversity* asked program participants to "bring who they are" to their leadership and clarify how they view their identities as school leaders. During the first residential weekend, participants were questioned, "Are you a Black leader or a leader who happens to be Black?" For the instructors on the *Investing* program, it seems clear that they would characterize themselves as conscious Black leaders, not professionals who happen to be Black. As an example of race- and color conscious leadership preparation in Britain, *Investing in Diversity* contributes an international dimension to the growing body of literature on self-defined Black leadership perspectives (Brown, 2005).

Lessons from White Educators Becoming Race Conscious

Like the headteachers of British schools, school leaders in the United States are disproportionately White. Results from the latest *Schools and Staffing Survey* (2007–2008) conducted by the National Center for Educational Statistics indicate that the racial breakdown of all US principals is 82.4 % White, 9.7 % Black, 5.9 % Hispanic, and 2 % other (including Asian American, Native American, and two or more races) (National Center for Education Statistics [NCES], 2011a). Principals of color are greatly underrepresented compared to the student population in US schools. In 2008 students of color made up over 45 % of the student population in public schools in the United States. This group included 17 % African American students, 22 % Hispanic/Latino students, and 7 % other (students who identify themselves as Asian, Hawaiian, Alaska Native, Pacific Islander, American Indian, or two or more races). In some states, such as California and Texas, and in the 20 largest urban school districts in the United States, students from racially diverse backgrounds constitute an overwhelming majority of the school population. In New York City, Chicago, or Los Angeles, for instance, students of color constitute 80 % or more of the student population (NCES, 2011b).

Aspiring school leaders in leadership preparation programs in the United States are also overwhelmingly White. While little research has been conducted on the views of White aspiring leaders toward diversity, a growing body of research has examined the views of White teacher education candidates. In her comprehensive review of the literature, Sleeter (2008) found that White preservice teachers failed to recognize the pervasiveness of racial inequity, held deficit views and lower expectations for students of color, adopted a colorblind approach to teaching, and lacked a sense of themselves as cultural beings which led to assumptions that their cultural lenses represented the norm for all their students.

How might White educators learn to "see race" and become race and color conscious? Teel and Obidah (2008) define color conscious teachers as those who understand that racism exists and that issues around race and racism affect schooling. Ullucci (2010) builds on this definition to describe race consciousness as occurring along three dimensions: (1) teachers understand that racism impacts schools, (2) they acknowledge and draw on the racial and cultural backgrounds of their students, and (3) they understand the value of culturally relevant pedagogies.

Johnson (1997) identified three possible explanations about coming to racial consciousness through her analysis of the published autobiographical accounts of White teachers and teacher educators (Howard, 1999; Paley, 1995; Sleeter, 1996). One explanation is that White educators become aware of race and racism by drawing on their own experiences of perceived marginalization to empathize and make connections with other marginalized groups (see, e.g., Greene, 1995; Paley, 1995). Another possibility is that White teachers reduce their prejudice toward other racial groups and begin to develop multiethnic competencies by engaging in cooperative endeavors with individuals and communities of color in relationships that approximate equal status (Allport, 1954). A third possible interpretation of this process is that White teachers gain access to an alternative standpoint (Hartsock, 1987) about race through living and working with individuals and communities of color and consequent exposure to insiders' perspectives on race and racism. In her subsequent life history study of six White teachers who were nominated as "aware of race and racism," Johnson (2002) found these teachers learned to see race through their perceived identity as outsiders, living and working with individuals of other races in equal status relationships, and personal religious and philosophical beliefs that emphasized equality and social justice concerns. Similarly, Ullucci (2011) also found that White teachers in racially diverse urban schools empathize strongly with their students when they themselves know what it is to be marginalized or thought of as "other," "different," or "needy." Firsthand knowledge of diversity as a lived experience was important for the three White urban teachers she studied. Ullucci concludes that, "knowing 'others' matters" (p. 575) for White teachers' development of race consciousness.

The narratives of White teachers coming to racial consciousness also indicate that preservice education programs that provide quality field experiences in urban communities can make a difference in the development of racial awareness. To avoid cultural tourism or voyeurism, these field experiences should strive to ensure the dignity of the communities where students are placed and focus less on exposure and more on engagement (Ullucci, 2010).

Although most studies of White educators developing awareness of race and racism have focused on teachers, Theoharis and Haddix (2011) found similar themes in their study of six White principals who self identified as social justice leaders. These principals were committed to creating more equitable schools for students from marginalized communities. They went beyond the colorblind perspective through their lived experiences in racially diverse communities, engaging in emotional and intellectual work around race that confronted their own privilege, conducting "difficult conversations" about race with their faculties, using race to critically inform their use of school data, and engaging with families of color.

Elements of a Race-Conscious Leadership Preparation Program

How might we restructure leadership preparation programs to make them more race conscious and develop aspiring school leaders' knowledge base about diverse communities? What might we learn from the perspectives and experiences of Black leaders in the *Investing in Diversity* program as well as the literature on how White educators develop racial awareness? Hafner (2009) notes that leadership preparation programs in the United States that have been redesigned to focus on leadership for social justice (LSJ) generally include critical reflection, problem-based learning, and the inclusion of leadership literature that emphasizes equity, diversity, and social justice.

Few of these recommendations to reform leadership preparation programs, however, have focused on the specific knowledge, skills, and abilities needed to develop culturally competent (Bustamante, Nelson, & Onwuegbuzie, 2009) or culturally literate (Johnson & Campbell-Stephen, 2010) leaders, and even fewer have examined how aspiring school leaders learn to go beyond a colorblind perspective to "see race" in their schools and their lives and develop an antiracist perspective in their stance as school leaders. Some preliminary strategies to begin this process in leadership preparation programs in both countries are described below.

Rethinking Selection Criteria and Program Composition

Reforming selection criteria in traditional leadership development programs is often framed in terms of establishing higher standards for admittance (e.g., higher GPAs, writing samples) to raise the professional status of the field. Like others who promote leadership for social justice, we advocate a more nuanced approach to selection criteria and program composition that includes the consideration of candidates' dispositions and life experiences that value diversity. McKenzie et al. (2008) suggest selecting individuals for leadership preparation programs who "already have a propensity to question the inequities found in schools" as well as those who have a proven track record as teacher leaders in their schools (p. 118). To prepare effective teachers for diverse urban schools, Haberman (1993, 1995, 2005) has long argued that university educators have to find ways to focus more on "picking the right people" rather than on "trying to change the wrong ones" through preparation programs.

With the increasing racial and cultural diversity of the student population in both Britain and the United States, we believe that selection criteria for future principals and headteachers should be incorporated in entry interviews that solicit potential candidates' lived experiences in diverse communities and their willingness to rethink their conceptions of race and the learning capacities of diverse learners (Garmon, 2005; Johnson, 2002).

Rethinking the composition of leadership preparation programs also requires rethinking our conceptions of who "fits" as an educational leader (Tooms, Lugg, & Bogotch, 2010). Aspiring Black and Global headteachers in the *Investing in Diversity* program often acknowledged to instructors the lack of affirmation and encouragement they had received from supervisors in their schools who didn't "see" them as headteachers. Participation in *Investing in Diversity* served to confirm their leadership potential and bolster their confidence to pursue headship.

One of the first steps in creating leadership preparation programs that are race and color conscious may be to acknowledge that there are multiple ways to lead effectively and that in both Britain and the United States we need to provide a variety of leadership development opportunities, including bespoke programs like *Investing in Diversity* that are focused on the needs and perspectives of aspiring leaders of color, as well as programs where students learn together in racially diverse cohorts. While Bush and Moloi (2008) note that Black-focused programs may prove controversial in some contexts, the responses of *Investing in Diversity* participants indicate this Black-led program provided important elements not readily available in traditional British leadership preparation programs, including Black leadership perspectives and role models. Racially diverse cohort programs are important as well, however, particularly for the education of White aspiring school leaders. The literature on White educators coming to racial awareness indicates that these students are unlikely to go beyond the colorblind perspective without being challenged by racially diverse standpoints in the classroom.

Internships in Diverse Communities

Similar to teacher education field-based experiences that immerse students in diverse settings (e.g., urban communities, Native American reservations, or schools serving recent immigrant students), aspiring school leaders should participate in internships outside their comfort zones where they learn about the perspectives of diverse parents and communities alongside of experienced community school leaders.[7] These internships might include apprenticing with principals or headteachers who are deeply connected to the local community as well as other field-based experiences where aspiring school leaders work under the leadership of parents and neighborhood leaders in community-based projects (Auerbach, 2009). To be most effective, these internships should be coupled with seminars where students can dialogue and critically reflect on how their experiences intersect with issues of race, culture, and power. The effects of these internships might be different for aspiring leaders of color than aspiring White leaders. Cross (2005) notes that simply immersing White students in diverse contexts for field experiences can serve to reinforce biases and stereotypes and reinforce "colorblind racism" if these experiences ignore how power and Whiteness operate and do not require students to address or challenge their own unearned privilege and advantage. Real-world internships can provide aspiring school leaders with crucial lived experiences in diverse settings, but they must be embedded within a spirit of critique to develop a more complex, asset-based approach and knowledge base about the cultural funds of knowledge (Moll, Amanti, Neff, & Gonzalez, 1992) and perspectives that diverse families bring to the school. As Ulucci and Battey (2011) note, aspiring educators must have support in order to manage the disequilibrium between "what color blindness tells them they see and the reality" (p. 1212).

For aspiring leaders of color in Britain, internships alongside of experienced Black school leaders can provide mentorship and critical leadership experience as well as everyday advice about ways to navigate a system where Black leaders are not only in a minority but may face active resistance from teachers and parents. For instance, the new BME Headteacher Internship Programme (DfE, 2012a) initiated by the National College for School Leadership provides deputy heads with a coach and the opportunity for a 10-day internship in another school as a working headteacher with support from an experienced BME headteacher as mentor.

Developing More Complex Views of Race and Cultural Diversity

Castro (2010) notes that preservice teachers continue to demonstrate the lack of a complex understanding of multicultural education and the processes of institutionalized racism and oppression. This is true of leadership preparation students as well. Many aspiring school principals in the United States and headteachers in Britain still subscribe to a belief in individualism and meritocracy that success in school depends on one's merit or hard work, or "pulling oneself up by their bootstraps" (Milner, 2010). This approach stems from a lack of awareness about structural and institutional inequities that affect students of color as well as other students who are marginalized in schools. Aspiring school leaders must learn to recognize and name how institutional racism is manifested in (1) the underrepresentation of Black and other school leaders of color, (2) achievement gaps between racial groups, and (3) whose cultural knowledge is included (or not) in the school curriculum.

To become culturally literate and race conscious, aspiring school leaders need to move beyond a "food and festival approach" to cultural diversity (Banks & Banks, 2010) that focuses on sharing cultural contributions to an analysis of the ways that schools may reinforce inequalities and blame students for realities beyond their control (Milner, 2010). Class projects like equity audits (Skrla, Scheurich, Garcia, & Nolly, 2004) where racial achievement gaps and differences in teacher quality are compared across local school districts can help uncover how "schools reinforce social inequality while pretending to do the opposite" (MacLeod, 1995, p. 11). These audits should also include analyzing the curriculum to investigate whose culture is included (or not) in textbooks, school assemblies, extracurricular activities, and parent involvement programs. Other consciousness-raising class activities might include field trips and community walks guided by community residents and activists who can provide an insider's view and historical perspective about issues and concerns in local communities of color (Lauricella, 2005).

Aspiring school leaders must also learn how to engage in "courageous conversations" (Singleton & Linton, 2006) and moral dialogue about race (Shields, 2004) and explore their own racial identities on their way to becoming antiracist leaders. Gooden (2011) defines "anti-racist leadership as leadership that actively fights against principles, beliefs, and acts (overt and covert) that operate to perpetuate race-based inequities in schools." Some of this work to develop the racial awareness of aspiring school leaders is already happening in social justice-oriented leadership preparation programs. Six US universities are currently developing curriculum modules under a FIPSE grant entitled "Preparing Leaders to Support Diverse

Learners" which are available online to enhance the curriculum used in UCEA (University Council for Educational Administration) school leadership programs.[8] For example, the University of Texas-Austin has developed a unit entitled "Building a Community of Trust Through Racial Awareness of Self" in which course instructors explore their own racial awareness while developing the racial awareness of students and others (Gooden & O'Doherty, 2011). The module includes readings, discussions, and conscious-raising activities that explore students' definitions of race and the effects of race and White privilege on their lives. The module culminates in the composition of a racial autobiography, similar to the cultural autobiography advocated by Brown (2004), but focused specifically on critical life incidents which contributed to the author's understanding of race, racism, and privilege. Engaging in class experiences, readings, and field experiences which foster a critical consciousness can help aspiring school leaders develop a more complex understanding of race and multicultural education and the ways that the school curriculum can be transformed to meet the needs of *all* students.

Conclusion

Race- or color conscious leadership preparation builds on and extends culturally responsive approaches (Johnson, 2006; McCray & Beachum, 2011) by acknowledging that in order for aspiring school leaders to develop competencies associated with culturally relevant leadership (e.g., high expectations for student achievement, incorporating diverse cultural knowledge in the curriculum, and creating inclusive organizational structures), they must first take into account the role of race in their schools, their communities, and their lives. Aspiring school leaders must know who they are as people, understand the contexts in which they lead, and question their knowledge base and assumptions about the status quo (Gay & Kirkland, 2003). We believe these self-reflective qualities are as important as developing more generic leadership skills and abilities.

A range of leadership preparation programs and experiences must be available to develop race-conscious and socially just leadership, including "bespoke" programs for leaders of color such as *Investing in Diversity* as well as immersion experiences and internships that place aspiring White school leaders outside their comfort zones where they learn about the perspectives of diverse parents and communities. The identities and life experiences of aspiring school leaders in both Britain and the United States must be considered in the selection process and further opportunities to reflect and interrogate those identities provided during the course of school leadership preparation programs.

Kimberle Crenshaw, professor at UCLA School of Law and Columbia University Law School and one of the founders of Critical Race Theory, has asserted that, "You cannot solve race problems with colorblind means."[9] In turn, we believe you can't prepare school leaders who are culturally responsive and socially just through colorblind leadership preparation. Leadership preparation programs in both Britain and the United States must help aspiring school leaders develop personal and professional cultural consciousness that challenges the status quo. As Professor Gus John (2009) notes,

> What difference does it make to the situation of the majority of the group that black teachers (and leaders) are supposed to represent, if the training and professional socialization those black teachers receive, the institutional culture of which they become a part, and the systems and processes they operate are identical to that of their white counterparts?

In conclusion, in order to change the way we prepare effective and socially just leaders for increasingly diverse schools in Britain and the United States, we must go beyond the colorblind perspective and acknowledge the "difference that difference makes." We believe that more race-conscious and culturally specific leadership preparation approaches can help create those change agents of difference who are so desperately needed in our schools and communities on both sides of the Atlantic.

Notes

1. While the term *BME* is widely used in the British research literature, it is contentious because it fails to differentiate between groups based on their cultural background and position in the racial hierarchy. We have used this term when citing particular research studies or government reports.
2. Students of color now constitute 67 % of the students in the London schools, 58 % of the students in Leicester, and 52 % of the students in Birmingham. See "Ethnic Minority Pupils Increase by 57 % in a Decade" (2011).
3. The National College for School Leadership is a government-funded center that initiates and coordinates professional development and research on school leadership in the United Kingdom.
4. Black and Global Majority is used in the *Investing in Diversity* program as a reflection of the reality that people of color are a majority in the world and increasingly in the urban contexts of Western countries. In the Investing program *Global Majority* is characterized as an empowering term that "brings us in from the margins and challenges directly those who have the power" (Portelli & Campbell-Stephens, 2009, p. 2).
5. Contextual value added (CVA) was a statistical procedure used by the UK government intended to show the progress children have made while attending a particular school by taking into account nine factors that the government believes will affect the performance of students such as gender, eligibility for free school meals, first language, and ethnicity among others.
6. In a British context, the term *Black* has been used in a political sense to mean those people of African, Caribbean, and South Asian descent and other groups who are discriminated against on the grounds of their race, culture, color, nationality, or religious practice. This use arises from the understanding that while individual ethnic groups have faced racism and discrimination differently, there is much that unites people of color in terms of government policy, particularly

around immigration and the way these groups have experienced education (see Richardson, 2007).

7. This concept is similar to Murrell's (2001) notion of "community teachers," accomplished urban educators from the local community who share their culturally competent practice with novice teachers through an apprenticeship approach.
8. Curriculum modules can be accessed on the UCEA website at http://www.ucea.org/lsdl-preparation-modules-new/
9. Quoted during an interview entitled "Post Racial Politics and History," September 29, 2010, GRITtv. Retrieved from http://www.youtube.com/watch?v=KubzkLs_pMk

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Chapter 59
Modeling Social Justice Educational Leadership: Self-Assessment for Equity (SAFE)

Zorka Karanxha, Vonzell Agosto, and Aarti Bellara

Modeling Social Justice Educational Leadership: Self-Assessment for Equity (SAFE)

The persistence of social inequities (reflected for instance as classism, racism, sexism, heterosexism, and ableism) that negatively affect students, families, and communities and contribute to disparities across groups as they engage with institutions instills a sense of urgency among many educators to respond to the call for equity. Calls for equity have helped to heighten the focus on social justice and make it a centerpiece of leadership preparation programs in the United States (US) (Furman & Shields, 2005; Marshall & Oliva, 2006, 2010). Education is the purview of the states in the USA rather than the federal government. However, passage of federal Education Legislation Act, No Child Left Behind (NCLB) (2001), exacerbated the tension between the states and the federal government over control of public education. With its strong emphasis on student achievement, NCLB consolidated an era of accountability across the country and placed educational leadership preparation programs at a crossroad between scientific management and social justice (Brooks & Miles, 2008). The tension between managerial approaches to leadership preparation and social justice-oriented leadership offers a moment(um) that if seized can improve education for all students (Furman & Shields, 2005). Despite the increased rhetoric on the value of social justice leadership in the USA, research shows that social justice issues still reside in the margins of educational leadership preparation programs as their focus remains on traditional topics such as school law,

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organizational theory, supervision, and finance (Brooks & Miles, 2008; Jean-Marie, Normore, & Brooks, 2009; Shoho, 2006).

In the research on leadership preparation and certification of aspiring principals in the USA, few program designs have been evaluated (Firestone & Riehl, 2005). According to Capper, Theoharis, and Sebastian (2006), "[a]ssessing leadership preparation should be the first priority in future research on preparing leaders for social justice" (p. 19). Similar to the efforts of Lalas and Morgan (2006) to establish a doctoral degree preparation program with social justice as a guiding concept, we describe our efforts to provide and internally evaluate a social justice-oriented leadership preparation program through an evolving model of self-assessment for equity (SAFE). SAFE is being developed and piloted by us (the first two authors) as members of a university faculty who prepare future school leaders in a graduate Department of Educational Leadership and Policy Studies (DELPS) in order to assess the alignment between the department's mission statement and the practices, processes, and policies of the program that affect students from application through enrollment until exit. SAFE coincides with departmental efforts to improve current institutional status, maintain program accreditation, excel in teaching beyond the leadership standards, and increase students' pass rate on the leadership certification exam. As such it can support broader attempts at evaluation (i.e., college-wide external evaluations).

SAFE is a student-centered model that is evolving organically and dialectically through our collaborative efforts to simultaneously conceptualize and apply it while conducting research related to the critical examination of the department's purposes and practices. As Shoho (2006) reminds us, individuals and institutions can interact in intended and unintended ways to affect leadership preparation (Shoho). We offer SAFE to assist leaders, leadership programs, and faculty in conducting an internal (self-) assessment of the integration of the social justice ethic throughout programs preparing leaders to facilitate equity and educational excellence across schools, students, families, and communities. Through SAFE we aim to improve the program in educational leadership and provide a model for programs similarly inspired to facilitate equitably excellent and socially just education for aspiring school leaders.

Critical Social Justice Education via Leadership

The conceptualization of SAFE is informed by critical education studies (Apple, 2000), critical social theory (Young, 1990), and critical social justice leadership (Ryan & Rottman, 2007) coupled with advocacy (Anderson, 2010; Bloom & Erlandson, 2003; Cambron-McCabe & McCarthy, 2005; Lather, 1991), anti-oppressive intentions (Kumashiro, 2000), and the following assumptions: (1) social institutions are human creations; (2) societal institutions continuously disadvantage some communities more than others; (3) patterns of (dis)advantage are not always visible; (4) social justice involves more than resource distribution and economics; (5) social justice is not consistent with the idea of just dessert; (6) social justice favors equity over particular versions of equality; (7) social justice involves all aspects of education; and (8) social justice calls for hope (Ryan & Rottman, pp. 12–16). We borrow and modify methods of evaluation (audits) and conceptual frameworks informing the development of social justice leadership preparation programs (see, e.g., Capper et al., 2006; Skrla, Scheurich, Garcia, & Nolly, 2004).

Reflected in this framework are our concerns about providing theoretical, conceptual, and practical knowledge congruent with constructs relevant to social justice leadership (i.e., empathy, care, critique, indignation), providing a program and related experiences that are responsive to the funds of knowledge from which students draw (Lalas & Valle, 2007; Moll, Amanti, Neff, & Gonzalez, 1992) and facilitating productive dialogue through the cognitive dissonance students may experience as they encounter opportunities to develop, apply, or translate their knowledge and experiences into practices, paradigms, and relationships that are conducive to social justice leadership in their respective contexts.

We work from a relational theory of social justice as (re)distributive and that is concerned with equality and/or equity of conditions, opportunities, and outcomes (Lynch, 1995). This relational theory of social justice is concerned with reducing patterns of inequity and harm that derive from hegemonic expressions of values and assumptions and fostering conceptions of social justice that are responsive to various expressions of contextual, cultural, and environmental knowledge. The SAFE framework is consonant with the ecological model of social justice advanced by Furman and Gruenewald (2004) who view environmental crises as inseparable from social crises.

Critiques have been made by female social and educational theorists such as Young (1990), Noddings (1999), and Smith (1987) that distribution has been privileged in social justice theory and relationships marginalized. Also inserting relationships into the discourse of social justice is Nancy Fraser (1997) who argues that recognitive justice is a foundation for social justice. The principle of recognition concerns culture, respect, and redress for oppression and injustice that occurs through cultural domination, nonrecognition (i.e., lack of authority, communication, representation), and disrespect. To provide a more complex understanding of social justice theory, Connie North (2006) identifies three relational spheres of tension: micro-/macro-level distinctions (i.e., institutional power, internal power), sameness/difference, and equality/equity. She concludes that singular approaches to education for social justice and the marginalization of actors (in policy and practice) to whom the intended benefits are expected to accrue will do little to result in equitable education. Unpacking these theories and grappling with their tensions and absences should be part of educational leadership that inspires toward more socially just/anti-oppressive relationships among actors across institutions impacting education. In giving attention to the theories of social justice, faculty preparing educators and administrators can respond to the critiques that social justice in the USA is under-theorized in teacher education preparation (Grant & Agosto, 2008), educational leadership (Jean-Marie et al., 2009), and educational policy (Gewirtz, 1998).

In the following sections, we provide a brief history of the social justice impetus in educational leadership preparation and review the conceptual and empirical research on social justice-oriented leadership preparation and evaluation. The literature review consists of four parts: (1) calls for teaching social justice in educational leadership programs, (2) models for preparing leadership for social justice,

(3) empirical studies on social justice leadership preparation, and (4) evaluations of leadership preparation programs. Additionally, we provide examples of how we have been implementing SAFE.

Literature Review

In our search for relevant literature, we used keywords in combinations such as educational leadership, social justice, equity, evaluation or assessment, and leadership preparation. From the literature in the databases Education Full Text and ERIC, we identified articles published in special or themed issues of US journals on leadership for social justice (e.g., *Administration Quarterly Journal*, 2004, *40*(1); *Journal of Research in Leadership Education,* 2010; *Journal of School Leadership*, 2002, *12(*2), *12(*3); *5*(3)) and articles published in other peer-reviewed journals, major texts (e.g., Marshall & Oliva, 2006, 2010), conference proceedings, and dissertations. In total, we reviewed approximately 100 related articles, book chapters, and dissertations. We left the time period open in order to gauge the historical development of the concepts of social justice and equity within the literature on educational leadership preparation in the USA. While the use of the above journals forwards a social justice framework that is contextually (US) bound, the broader literature review includes authors from the UK, Canada, and Australia.

Calls for Teaching Social Justice in Educational Leadership Program

Appeals for attention to social justice leadership have been accompanied by critiques of its ahistorical and acritical theorization (Grogan, 1999 cited in Jean-Marie, Normore, & Brooks, 2009) and exclusion of interdisciplinary and international perspectives (Jean-Marie et al., 2009). According to Bates (2006), “conflict over curriculum, pedagogy and assessment is endemic in public discussions of education” but has been “largely sidestepped in discussions of educational administration” (p. 146), as have been the voices of critical theorists (some exceptions are Brooks & Miles, 2008; Dantley & Tillman, 2010; Jean-Marie et al., 2009; Schoorman & Bogotch, 2010; Young & Lopez, 2005). For instance, Sharon Gewirtz’s (1998) efforts to conceptualize social justice from the perspective of educational policy are virtually absent in the literature currently framing social justice in educational leadership in the USA. Advocates of social justice in educational leadership have drawn on social reconstructionist (Bogotch, 2002; Capper, 1997), critical theory, and postmodern perspectives (Foster, 1986; Grogan, 2004) and have helped to bring the concepts of equity and justice into the discourse of educational leadership preparation.

Despite the increased focus of scholars on social justice in educational leadership (Bogotch, Beachum, Blount, Brooks, & English, 2008; Jean-Marie, Normore, & Brooks, 2009; Capper, Theoharis, & Sebastian, 2006; Larson & Murthada, 2002;

Marshall & Oliva, 2006, 2010; McKenzie & Scheurich, 2004; Skrla et al., 2004; Shoho, 2006), there has been little or no systematic evaluation of leadership preparation programs (Capper et al., 2006; Chenoweth, Carr, & Ruhl, 2002; Shoho, 2006) and their impact on the preparation of aspiring school leaders. The importance of addressing this gap in the research is made evident by recent studies of principals who have been able to infuse social justice within a school's culture despite resistance from colleagues (Kose, 2009; Theoharis, 2007).

Models for Preparing Leadership for Social Justice

The capacity or suitability of programs to prepare leadership to act courageously about social justice in education is an under-explored area in the research on leadership preparation (Jean-Marie et al., 2009). Many scholars attuned to the importance of preparing leadership for social justice propose that to act upon inequalities and lead toward social justice requires (1) requisite perspectives (that the inequalities are unjust, unwarranted, and a function of various factors within the school and educational community) and (2) a willingness to restructure organizations (McKenzie et al., 2008; Radd, 2007; Skrla et al., 2004; Theoharis, 2007). Scholars have provided models for programs preparing leadership for social justice in professional development and pre- and in-service leadership preparation programs as a separate but equal component to effective leadership training (Cambron-McCabe, 2010; Cambron-McCabe & McCarthy, 2005; Larson & Murthada, 2002; Pounder, Reitzug, & Young, 2002; Young & Laible, 2000). According to McKenzie et al. (2008), programs preparing leaders for social justice should have three goals as a basis of their curriculum and instruction: (1) achievement gaps from high-stakes testing should be controlled by increasing the achievement level for all students; (2) students need to be prepared to live as critical members of society; and (3) schools need to be structured properly to ensure academic success in heterogeneous environments.

More specific recommendations have been provided to address the curriculum, instruction, and assessment of educational leadership programs oriented toward social justice. For instance, Young and Laible (2000) suggest three approaches educators could use to teach toward racial justice: (1) the personal approach, (2) the institutional approach, and (3) the multiple fronts approach. Brown (2005) advocates a radical change of content, delivery, and assessment, and she outlines eight strategies that comprise her transformative framework and pedagogy: cultural autobiography, life histories, prejudice reduction workshops, reflective analysis journals, cross-cultural interviews, educational plunge, diversity panels, and activist action plans. Hafner (2010) describes two specific pedagogical tools to create a socially just environment: (1) social justice education practice and (2) social reconstructionist schooling. Both these approaches are part of a framework that reminds educators that the process of teaching for social justice models the goals of social justice education (p. 203).

A considerable part of the literature emphasizes the importance of awareness and understanding of the potential harmful effects of the inequalities as a fundamental component toward creating socially just environments (Brooks & Miles, 2008; Dantley & Tillman, 2006; Furman & Shields, 2005; Hafner, 2006; Lopez, Magdaleno, & Reis, 2006; Theoharis, 2007). Capper et al. (2006) provide a research-based framework for developing programs toward preparing leaders for social justice in which emotional safety for risk taking is a necessary condition that permeates both horizontal and vertical dimensions of leadership programs. The horizontal dimension consists of three domains: critical consciousness, knowledge, and skills, which need to be reflected in curriculum, pedagogy, and assessment (vertical dimensions).

Some have argued that who enters educational leadership preparation programs is just as, if not more, important a factor in providing social justice leadership as the preparation provided. To ensure that some aspiring school leaders enter preparation programs with an inclination toward social justice and willingness to engage in developmental experiences toward social justice leadership, there needs to be stringent selection criteria established at institutions informing the selection of students into programs preparing schools leaders (McKenzie et al., 2008). Furthermore, some have recognized that social justice preparation is more likely to be effective when departments, institutions, and organizations share a unified front to infuse social justice within the curriculum (McKenzie et al., 2008; Murphy & Vriesenga, 2006).

Empirical Studies on Social Justice Leadership Preparation

There is a considerable number of studies on leadership preparation programs (e.g., Darling-Hammond, LaPointe, Meyerson, & Orr, 2010; Levine, 2005; Murphy & Vriesenga, 2006). However, there is a dearth of empirical studies on leadership preparation for social justice. Boske (2010) found that students of color in an educational leadership preparation program received fewer resources, faced resistance from faculty when drawing on their social and cultural capital, and were silenced in classrooms as dominant perspectives were perpetuated. The experiences of participants in leadership preparation programs speak to the need for increased research on how educational leadership programs perpetuate injustice (Rapp, Silent, & Silent, 2001).

Evaluations of Leadership Preparation Programs

Studies on evaluation of leadership preparation programs, both graduate programs at colleges and district "homegrown" principal preparation programs, have highlighted several components that make these programs successful (e.g., Brown, 2006; Darling-Hammond, LaPointe, Meyerson, & Orr, 2010; Nelson, de la Colina, & Boone, 2008). However, "research on evaluations of leadership preparation programs [for social justice], their content, delivery, and outcomes, is virtually non-existent" (Capper et al., 2006, p. 219). Capper et al. chastise the field of leadership preparation programs for social justice for "languishing in hypocrisy when faculty expect equity-oriented leaders to maintain high standards of accountability, supported by federal legislation, when these programs themselves engage in no systematic, empirical studies or equity audits of their own" (p. 219). Cambron-McCabe and Cunningham (2002) expressed similar concerns about the lack of sustained dialogue confronting race and class and urge us (leadership professoriate) to learn "how to incorporate such a dimension throughout our preparation programs" (p. 295).

In an external cross case study of three programs (early childhood, counseling, and a doctoral program in leadership) rooted in social justice preparation of professionals, Rodriguez, Chambers Venzant, Gonzales, and Scheurich (2010) outlined the four critical values evident in all three programs: first, the value of faculty preparation; second, the value of selecting diverse students who demonstrated social justice in their professional experiences; third, the need for a social justice mission to be at the core of decision making; and fourth tailoring the program to meet student needs. The authors noted a variety of program structures across the three cases that underscore the need for continued conversations about the most effective delivery method for individual programs and the students they serve. Finally, resistance to social justice was present on multiple organizational levels and among groups (faculty, students, and administrators). The emphasis of the study was program structure and processes rather than their immediate impact on students' practice in schools. While this study is of value to the field, it does not address specifically the preparation of aspiring school leaders in principal certification and master's degree programs, nor is it a study of their own programs. External evaluations of leadership preparation programs seldom focus on the suitability of the programs for preparing social justice-oriented leaders.

Although the practice of internal or self-evaluations of leadership programs has been introduced to the field (e.g., Glasman, Cibulka, & Ashby, 2002), it has not yet been utilized to focus on those aspects of leadership preparation associated with social justice pedagogy and curriculum. According to Skrla et al. (2004), school leaders need access to practical tools for use in developing a comprehensive and insightful understanding of inequities, tools which should be "designed to be useful to professors in leadership preparation programs for the purpose of helping them develop leaders who have the knowledge and skills needed to create equitable and excellent schools" (p. 138). The literature lacks a conceptual framework for the evaluation of leadership preparation programs for social justice. In this chapter we fill this void in the literature and offer a model from conducting internal or self-assessments with regard to equity in a critical social justice leadership preparation program.

SAFE Praxis

DELPS offers an advanced degree (master's degrees) to students who have already earned a bachelor's degree from a 4-year university. Applicants must meet admission requirements such as graduate point average (GPA), a minimum of 2 years of teaching experience, and a teaching license. SAFE represents internal praxis: “engaging in a cycle of theory, application, evaluation, reflection, and then back to theory” (Freire, 1998, p. 75) in order to continuously assess whether DELPS actions reflect a social justice orientation. Informing our praxis is the context in which we work, namely, the mission statement and philosophy of DELPS:

> The purpose of DELPS is to prepare ethical, compassionate, public intellectuals to become critical and transformative leaders committed to social justice in America’s schools. The primary means to achieve our purpose are: collaborative inquiry, culturally relevant pedagogy and public deliberation on the historical and perennial issues that confound public education in our nation. We expect our faculty and students to make value-added contributions to national, state, district and school-level policy and purposeful inclusive practices that lead to social justice and learning for all.

The mission statement was constructed by the faculty in 2008 and since then some have left and others have arrived. In our context, we operate under Florida Leadership Standards whose language provides an exemplar of what Brooks and Miles (2008) consider a return to scientific management in schools where issues of equity and social justice are almost nonexistent (Black & Karanxha, 2009). Begin with Students who participate in social justice leadership means will likely confront traditions and superiors in the field that may not be similarly oriented toward equity and social change as “educational leaders in districts and schools today are defined by a conservative discourse that homogenizes education throughout the country” (Grogan, 2004, p. 222).

(Re)Drawing (from) the Audit Culture

SAFE is a model of internal assessment that poses as its problem, the extent to which the social justice ethic is infused throughout the experiences made available to students in educational leadership programs. The equity audit is a tool based on a history of auditing in civil rights, curriculum and state accountability policy systems. Its areas of concern for evaluation include teacher quality equity, programmatic equity, and achievement equity. By combining the curriculum audit (English, 1988; Poston, 1992) with the equity audit and a praxis approach to program evaluation based in the ethics of critique and justice and the practices of reflection and advocacy, we respond to the managerial impulses driving leadership in this era of accountability (Anderson, 2010). This model also moves away from the audit culture’s emphasis on external evaluation. SAFE coincides with the progressive framework of leadership in which curriculum, broadly defined, is central (Ylimacki, 2011).

We appropriate and translate the programmatic component of the equity audit described by Skrla et al. (2004) and curriculum equity audits into the self-study process. We also borrow from the areas of analyses (e.g., individual differences, administrative and supervisory practices) of Mitchell and Poston’s (1992) equity audit and standard three of Fenwick English’s (1988) curriculum management audit (connectivity and equity) which calls for cohesion of the curriculum, examination of the allocation of resources for disparities and inequities (e.g., financial, programmatic, and racial), and an exploration of remedies. Although the above-named audits typically focus on K-12 schools or districts, we are appropriating and translating these tools for use in higher education. In the tradition of equity audits in the K-12 schools, we are using percentages and ratios to determine whether there is a disproportionate and under- or overrepresentation of racial/ethnic groups in the admission process. Our theoretical frame is informed by social constructionist perspectives in that we view educational leadership, policy, and curriculum/instruction as social constructions amid power relations that can be altered through the reappropriation of tools for the benefit of equity and excellence. To conceptualize SAFE we borrow from the framework on social justice leadership preparation advanced by Capper et al. (2006) and modify these components where necessary in response to the local needs of the context in which we work. SAFE is a student-centered model, meaning it looks at the phases in the students' journey through the program of study (from pre-enrollment, enrollment/engagement, and post-enrollment) in relation to the policies, processes, practices, and relationships concerning curriculum (official, hidden, null), pedagogy, and assessment that are primarily structured by the institution and its representatives (Fig. 59.1).

Enrollment

The components we include in this phase of student preparation are teacher quality, curriculum, pedagogy, assessment (Capper et al., 2006), and achievement. The teacher quality indicator for SAFE is whether faculty are modeling the expectations they require of the students in leadership preparation programs for social justice. The areas of interest are research, publishing, teaching (pedagogy) (Capper et al., 2006), hidden curriculum of faculty, and their professional development (i.e., what workshops or seminars do faculty choose to attend).

Curriculum

Our definition of curriculum as all the planned and unplanned experiences that students have and that matter in their access to educational opportunity, outcomes, and processes encompasses the official curriculum, hidden curriculum, and null curriculum. In studying the program for social justice, we have focused on the hidden curriculum which we discuss later as one of the examples of studies provoked through the development and implementation of SAFE.

We view official curriculum as courses taught in the program, syllabi, and additional content used in courses and assignments that lead to knowledge (of), knowledge (how), and knowledge (to) (Apple, 2000). Knowledge of would include oppression, inequities, dominance, assimilation, exclusion/othering, and practices leaders for social justice have successfully used to address the inequities. Knowledge on how to (curriculum on skills) would include ways to disrupt the policies and processes that maintain the status quo and enable the existence of unjust institutions. Knowledge to curriculum on dispositions would engage students to analyze and critique their values and beliefs on diversity and equity for

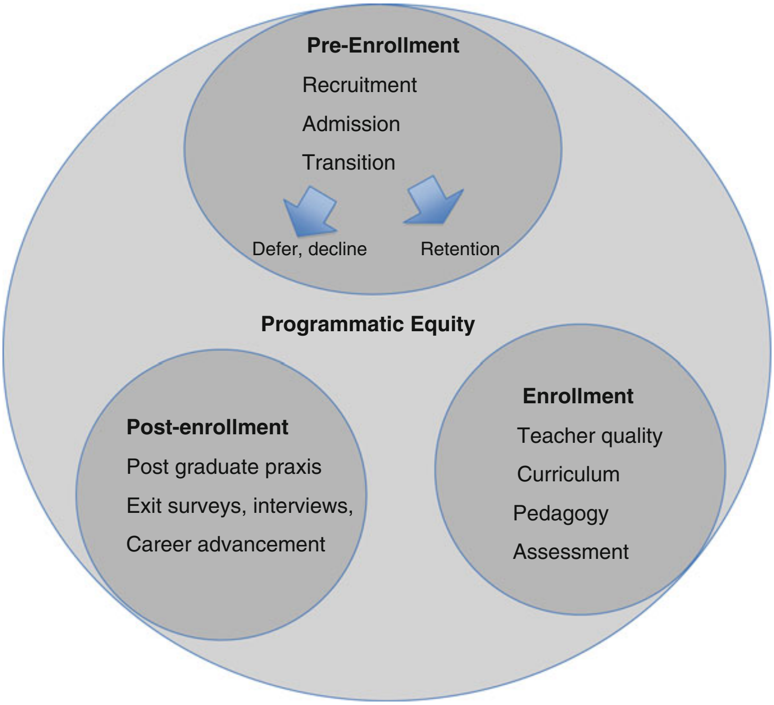
Pre-Enrollment
Recruitment
Admission
Transition
Defer, decline
Retention
Programmatic Equity
Post-enrollment
Post graduate praxis
Exit surveys, interviews,
Career advancement
Enrollment
Teacher quality
Curriculum
Pedagogy
Assessment

Fig. 59.1 Self-Assessment for Equity (SAFE)

excellence. The goal is to move students toward beliefs that inequalities in schools are unjust, unwarranted, and a function of various factors within the school and educational community and: toward a willingness to restructure organizations (McKenzie et al., 2008).

The null curriculum (Eisner, 1994) is what we do not teach, thus implying to students that this knowledge is not important in their educational experiences or in our society. According to Eisner, if we are concerned with "consequences" of our "programs" and "their role in shaping those consequences" (in our case students' knowledge, skills, and dispositions), then we should examine what faculty of a program do not teach. "Ignorance is not simply a neutral void; it has important effects on the kinds of options one is able to consider, the alternatives that one can examine, and the perspectives from which one can view a situation or problems" (Eisner, p. 97). We advance Brown's recommendation on infusing issues of equity and difference throughout the range of courses offered in the program (Brown, 2005, as cited by Capper et al., 2006).

Pedagogy

The centrality of pedagogy to social justice education has been noted (Brown, 2006; Furman & Gruenewald, 2004; Grogan, 2004). This particular component is concerned with teaching to develop the knowledge, skills, and dispositions of students. Teaching strategies recommended by Brown (2006), Hafner (2010), Young and Laible (2000), McKenzie and Scheurich (2004), and Skrla et al., (2004) are instructional approaches that we will rely on in addition to those in our repertoire. For instance, it is not uncommon for students to have assignments (some required and optional) that are framed as life histories of curriculum ideologies, asset-based portraits of communities, equity audits, and leadership or curriculum platforms in which they are asked to conduct research, take a position on an issue, plan for action, or communicate their findings with others.

Assessment

Assessment practices of the program related to enrollment concerns the knowledge, skills, and dispositions. At the conclusion of the program of study, students prepare a portfolio that faculty evaluates. The portfolio is organized around the domains featured in the state's leadership standards, and students are required to include a reflection of their leadership development in each domain and academic and practice-based artifacts they have created individually or as part of group projects. Their reflections and topics they explore in the artifacts provide us with anecdotal data on whether the value of equity has become a relevant frame of reference and guide in their development and expression of leadership. Additionally, in the Foundations of Curriculum/Instruction Course, students take a survey of curriculum ideologies, and over the last 4 years, no more than two students in a class have embraced the curriculum ideology related to social reconstructionism/social justice.

Through our studies of students' artifacts (statements of interest) and experiences (see the following section for descriptions of studies), we are better able to assess the impact of their preparation for social justice leadership on their practice in schools and understand the population we serve. We have yet to conduct systematic analyses of our courses; however, students interviewed have been able to recollect where preparation has explicitly referred to the concept of social justice, while others were able to infer how content has indirectly invoked notions of equity and justice.

Piloting SAFE: Our Experience

Students experience our program in three phases: pre-enrollment, enrollment, and post-enrollment.

Pre-enrollment

The processes under examination in this stage are recruitment, admission, and transition from admission to actual enrollment in the program. Our process mirrors the recommendations in the literature on social justice leadership preparation concerning the selection and evaluation of candidates provided by McKenzie et al. (2008) who suggest "[t]hat candidates be asked to respond to written materials on social justice and describe their leadership experiences and their attitudes and assumptions about school leadership so that faculty could evaluate their social justice orientation" (p. 121).

The importance of student selection has been raised in the literature (Capper et al., 2006; Hernandez & McKenzie, 2010; Lopez et al., 2006; McKenzie et al., 2008). There is agreement in the field on the necessity of increasing the diversity of students through "aggressive" (McKinney & Capper, 2010) recruitment and selection of students. Despite the noted importance of selection in the literature and studies conducted on leadership preparation programs with a social justice framework (e.g., Hernandez & McKenzie, 2010; McKinney & Capper, 2010; Rodriguez et al., 2010), there is little research that specifically and deliberately examines the selection of students as an institutional process that affects the movement of students from underrepresented racial/ethnic groups of color into educational leadership.

The Hidden Curriculum: In this study we focused on the department's efforts to produce policy and procedures to guide the application and selection for recommending (to the graduate school) a diverse pool of candidates for acceptance into a master's degree program of educational leadership. We (Karanxha, Agosto, & Bellara, Forthcoming) used an interpretive lens featuring constructs based in critical and sociocultural theory, the *will to policy*, and the *hidden curriculum* to examine the department's selection process in the master's degree program. We found that (1) there was a low number of applicants from underrepresented groups and (2) that the unsystematic process of applicant selection operated as *hidden curriculum* affecting the opportunities for the program to enhance meaningful candidate contact with diversity (we found that qualified women of color would have experienced the highest rate of rejection were it not for tie-breaking vote (an unplanned procedure) from one of the faculty that enabled more women of color to be admitted in the program). We define the *hidden curriculum* as teachings that are unintended, unanticipated, and/or unconscious that socialize students and contribute to the social, political, and cultural climate of educational spaces and ultimately society. It is a theoretical framework based in critical theory and useful for exploring the social functions of education. Uncovering hidden curriculum can illuminate the processes in higher education institutions that produce stratified outcomes (Margolis, Soldatenko, Acker, Gair, Peekaboo, 2001).

We initiated a process for revising the selection process and developed a rubric to score the application materials of the candidates and a prompt that would suggest to the admission committee those candidates who had a social justice inclination. By adding criteria to the selection process, we hoped to reduce arbitrariness in the process and at the same time value the candidates who voice their thinking and orientation toward social justice.

Despite the revised process, during the second selection cycle, we noted a similar trend and decided to look at the selection process longitudinally. In this study we illustrate how institutional structures disenfranchise African American women in their efforts to become educational leaders in K-12 schools through faculty negotiations of power and privilege in the policies and practices affecting candidate selection (Agosto, Karanxha, & Bellara, 2010). We analyzed the candidate selection process and faculty participation through critical race theory (CRT) praxis with a focus on racism (i.e., democratic, color-blind, dysconscious) and the principle of interest convergence/divergence. This exploratory self-case study, based on self-study methods and equity audits, used qualitative data such as field notes, narratives from conversations, experiential knowledge, memos, and descriptive statistics such as percentages and ratios to describe the disproportionate rejection of African American women applying to an educational leadership program as a factor in their underrepresentation in educational leadership. We found that African American women were rejected at a higher rate than their white counterparts when attempting to enter the educational leadership program. Their efforts to become educational leaders coincided with the difficulties faculty faced in a department of educational leadership to engage in race-conscious discourse. We concluded that departments of educational leadership need faculty who will confront race/racism and gender through race-conscious discourse in which they face and embrace risk.

Enrollment

Searching for a Needle in a Haystack: Utilizing a prompt as part of the application process to the program provided the department an opportunity to know their future students' knowledge, skills, and dispositions. As part of SAFE, we examined applicants' statements (a total of 34 statements and approximately 135 pages of text) of interest for indications of a social justice/anti-oppressive orientation (Agosto & Karanxha, 2012). The statements were submitted as part of the admission process into an educational leadership and policy studies master's degree program, while this analysis occurred after all decisions regarding their rejection and acceptance were finalized. To interpret the statements, we used Apple's (2001) description of three types of knowledge and the four approaches to anti-oppressive education that Kumashiro (2000) identified as recurring in the work of educators and educational researchers concerned with issues of oppression.

Four themes in the candidates' treatment of the writing prompt concerning their leadership in relationship to equity included ignoring, marginalizing, mentioning, and embodying a social justice orientation. Next, we centered our analysis on the few candidates who embodied an ethic of (social) justice by conducting a secondary level of analysis in order to extrapolate the knowledge, skills, and dispositions of critical literacy and gain a nuanced understanding of their leadership practice and our shared perception of what constitutes social justice leadership. We also identified five broad themes that resonate with our understandings of what social justice leadership entails: realistic hope, advocacy, culturally diverse bridge building, insistence, and multi-level critique. These themes reflect the diversity in what we understand as practices conducive to our working definition of social justice advocacy as an expression of anti-oppressive advocacy. We also recognize the absences in their statements as marginalized discourses.

We found that few applicants used terminology in their statements of interest that speak to inequities and biases: racism, sexism, classism, gender, etc. As a result, the department determined that a course on culturally relevant leadership across diverse communities would help students to understand foundational concepts that support discourses of social justice related to anti-oppressive education (racial justice, eco-justice) enacted by communities, schools, and fields of study (critical (dis)ability, curriculum studies). We also noticed that after admission in the program, some of the students either deferred enrollment or chose to not enroll due to financial reasons. Since then we have proposed that a fellowship be established to support students who face financial hardship and have indicated through their application package several of the indicators that we as a department are committed to fostering.

The Journey of Elam: In our attempts to connect with similarly-minded individuals and gain a better understanding of leadership for social justice praxis in the surrounding districts, we explored pedagogical moments of Dr. Donna Elam in her journey as a public intellectual (Karanxha, Agosto, & Elam, 2011). Using autobiographical methods, we examined critical moments in her work across contexts: conducting diversity workshops, providing professional development for principals and teachers, and leading district and regional interventions in response to court orders to racially desegregate. We focused her leadership through the lens of critical pedagogy. In the journey of Elam, we found an expression of critical social justice leadership that is inspired and empowered by the values of public service, spirituality, and humanitarianism. This autobiography contributes to our knowledge of educational leadership practiced by a Black female educator.

Traversing Educational Leadership: Our next effort as part of SAFE was to study the experiences of Black women who had graduated from or were in the latter stages of our program (Karanxha & Agosto, 2011). We were particularly interested in the curriculum and pedagogy of our educational leadership program which aims to support systemic equity through the leadership it models and encourages. Furthermore, we wanted to know how leadership preparation, when informed by the concept of social justice, supports and/or inhibits the capacity of Black women to serve as social justice leaders personally and professionally. We turned to the lived experiences of six Black women in order to learn from their stories traversing educational leadership preparation. We relied on their lived experiences and narratives of experiences that countered, contradicted, denied, and/or affirmed the program's intention to embolden students to lead toward social justice. We used CRT and critical legal theorist Derrick Bell's (1992) argument that race and racism are so deeply embedded in US society that racism is a permanent condition.

The themes from interviews suggest that (1) race/racism is present even when avoided, (2) racial and ethnic diversity is lacking (among faculty and students), and (3) racial battle fatigue from racial micro-aggressions. Thus far we have found that students perceive social justice as a value unevenly distributed across the program.

The program's lack of integration of social justice throughout its curriculum raises concerns in the program's capability to fulfill its mission and prepare students to become transformative social justice leaders. Social justice issues when discussed became a source of further divide rather than common understanding. More specifically, issues intersecting race, gender, and class were accompanied by tension and conflict in class. These discussions led to limited success in bridging difference and knowledge and resulted in very little or no change in dispositions in students who entered the program with value-neutral orientations. The stories of the Black women suggest that much unlearning is needed and that the politics of identity (student, cohort, racial) are active and contrary to the development of a learning environment conducive to learning about and practicing social justice.

Post-enrollment

During this phase, students leave the program, and we are concerned with their experiences and views of the program (via exit surveys, interviews, focus groups), postgraduate praxis (their sense of capacity and efficacy to engage in leadership for social justice, their knowledge, skills, and dispositions as reflected in actions they take (not take) when faced with injustice in their schools), career advancement (promotion, i.e., who gets hired, who gets transferred, or who gets fired), and the program's efforts to provide support for its graduates.

Teacher Leadership: In order to evaluate whether the educational leadership preparation program promotes a sense of agency and builds capacity, we interviewed women of African descent (who identify racially as Black) on how the program aided their work as teacher leaders for social justice (Agosto & Karanxha, 2012). From participants' narratives of experience, we extracted their understandings and expressions of social justice that suggest teacher leadership as described in the literature as well as those which are absent. Reflective interviews with teachers who had nearly completed or recently completed the educational leadership preparation program provided insights into our graduates' teacher leadership.

The participants recognized learning gains for self (not as discrete knowledge or sources) in their overall preparedness to lead from the disposition with which they entered. In their work they were able to operationalize and concretize abstract concepts such as advocacy and equity in their contexts. The participants were able to reflect on and recall specific instances in which lessons in the program informed their leadership practice. Furthermore, all of the participants demonstrated egalitarian values. More importantly, some found ways to express these values in their efforts to support students' learning by building relationships, marshalling resources, and breaking down barriers. Their expressions of social justice help us to understand their varied notions of the concept which according to Bogotch (2002) has "no fixed or predictable meanings" (p. 153). As societies redefine what is unacceptable, unreasonable, intolerable, or inhumane, the meanings given to the concept social justice will likely shift.

The Work Continues…

The process we have described so far has been organic and has been shaped by our context and the changes we have experienced as a department. Our next steps include a curriculum audit of the syllabi and interviewing of the faculty in the program. We have found that the process of self-assessment is continuous and that praxis of self-assessment must be done in collaboration. Furthermore, this work requires a combination of risk taking, stamina, persistence, and advocacy for all forms of justice over the long haul (Horton, 1990). Our intentional laboring to center social justice through SAFE has helped us to better articulate the tacit nature of our work, examine our sensibilities regarding equity and justice, increase the transparency of our work for colleagues and students, and model how an equity framework can help to guide leadership, preparation, and assessment toward social justice.

Educational leadership faculty hold some responsibility for developing school leaders who are prepared to aim toward social justice, forge democratic communities, attack inequitable treatment, and champion advocacy-oriented action that supports the sustainability of earth and the flourishing of lives. Ignoring the cumulative effects of past and present injustice allows systems of inequity to remain unchallenged and deprives all students, albeit differently. The challenge is to recognize where preventions have failed and respond by providing redress, remedy, and relief from the causes and cumulative effects of injustice (Agosto et al., 2010). We recommend that the field of educational leadership preparation develops a research base concerning the evaluation of leadership preparation programs that are intentional in their efforts to prepare effective leaders with a social justice ethic.

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Chapter 60
Inserting Inclusivity and Social Justice into Conceptualizations of Leadership for Early Childhood: Theoretical Anchors and Postfoundational Pedagogies for Inspiring Provocations in the Field

Julie Nicholson

> *I continue to ask myself…as millions of American children suffer and even die from social neglect in one of the richest and most powerful nations in the world. How and why do we continue to walk past these children—in homeless shelters, in juvenile detention centers, in adult prisons, in multiple foster placements, in segregated and impoverished communities, on dangerous street corners in a crossfire of drugs and violence, in underfunded schools characterized by hopelessness—why aren't we so alarmed at this betrayal of the American dream and fundamental human rights that we rise in a new revolution against the forces that allow such misery and wasted human potential to exist?*
>
> —Beatrice Fennimore, 2011, p. 1—

> *Our task is not just to learn how to be a leader. It is to grapple with the complex conceptual structural and political roots of leadership aspiration and to ask ourselves what leadership is for.*
>
> —Amanda Sinclair, 2007, p. 33—

The Call for Leadership Development in Early Childhood

Public recognition is growing among diverse stakeholders that strong and sustained investments in children's first 5 years provide a public good and are essential for reversing our most intractable equity gaps in student achievement and citizens' health and well-being across the lifespan (Heckman, 2008; Reynolds, Temple, Ou, Arteaga, & White, 2011). Although this increased focus on the importance of early childhood is enormously beneficial for a profession too often undervalued and underappreciated, it is inspiring renewed concerns about the lack of a developed pipeline for leadership development, a necessity for comprehensive coordinated

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systems building within the field (Goffin & Washington, 2007; Kagan & Bowman, 1997; Kagan & Neuman, 1997). This chapter aims to articulate the historical barriers that have limited leadership capacity building within the early childhood profession including the marginalizing effects resulting from the use of corporate literature to inform the field's production of the construct of leadership. Variations in more contemporary discussions of leadership are presented and highlight the field's expansion beyond traditional business models towards relational and field-oriented constructs. An argument is made that conceptualizations of leadership must continue to be expanded in order to bring visibility to the leadership activities that have too long remained in the shadows of public discourse and to keep the field's collective gaze on the expressed *purposes* of our leadership work as fighting for social justice and equity in society. Through a tripartite discussion of conceptual anchors, postmodern pedagogies, and contextualized narratives of work in the field, a window is provided into one graduate program's work to author new ideas about leadership for early childhood.

Historical Inequities in the Conceptual Production of Leadership

> *At the last meeting there was a discussion about the leadership conference and who will be attending…This has often been a topic of conversation – who are we talking about when we talk about leaders?…Many people still strongly believe that leaders are people in formal positions of authority and, in the case of some of the people in the group, people who work specifically as directors of a center…I took the opportunity to suggest that people who bring value aren't just those in power… I am not and have never been the director of a center, but believe that through my experiences and education I bring a lot to the table, and I think people would be missing out on valuable perspectives if they exclude people simply based on the position they hold…I fully understand it is hard to break away from those classic definitions and begin to embrace new ideas around leadership… there is possibly a lot of fear to redefine what a leader is.*
>
> –Mia, Child care provider—

> *In working with the senior management team I found that my style of communication and focus on program is viewed as avoiding leadership. At first I believed the expectation was that I needed not only to change my style of communication to be more businesslike, but also to change the focus of my work from program to pure administration…I believed I had to change, but that seemed to be a contradiction to my personal values regarding the field… I do not need to divert my focus from program, I need to repackage my presentations about program…delivering the key ideas and concepts without the assumption that the other executives know the work of my department…Making the work visible, compelling, and understandable is necessary.*
>
> –Olivia, Program Director—

Scholars have outlined many reasons to account for the paucity of leadership development in the profession of early childhood. Obstacles described include the lack of an agreed-upon definition of leadership, early childhood professionals' feelings of ambivalence about authority, their limited opportunities for informing policy or engaging in professional collaboration, and the field's historically low compensation rates. Additionally, low value and disrespect accorded to teacher and care provider skills in society, the absence of a professional career ladder, positioning of leadership training within institutions of higher education, and poor public perceptions of women in leadership positions are named as explicit barriers impeding leadership development within the profession (Cox, 1996; Ebbeck & Waniganayake, 2003; Morgan, 1997; Whitebook, 1997). Recognizing the import of these challenges, it is essential to articulate that traditional conceptualizations of leadership, inspired by organizational structures in corporate America, have also severely limited theorizing and discussion of leadership in early childhood. Traditional models have left a legacy with our field that "leaders" are program directors or other field roles commensurate with the highest levels of formal authority within organizations, and being on a "leadership track" means ascending a hierarchy increasingly distanced from direct service work with children and families (Ebbeck & Waniganayake). These traditional mental models of leadership are still strongly influencing the field today as reflected in national early childhood leadership institutes dedicated to "enhancing the management skills, professional orientation, and leadership capacity of early childhood *administrators*" (http://cecl.nl.edu/) and state-level quality rating and improvement systems, charged with improving the quality of early learning and care programs for children from birth to 5 years old, limiting the scope of discussion about leadership to program *directors* (www.cde.ca.gov/sp/cd/re/documents/fnlrpt2010.pdf). As developing leadership capacities within early childhood has historically been inversely correlated with direct work with children and families, an unfortunate legacy has created a false and inequitable binary between direct service work and leadership.

Traditional definitions of leadership drawn primarily from business literature—privileging individual performance, competition, certainty and decisiveness, material success, and authority "over" others—have also served to marginalize relational approaches to leadership, a preferred style among the majority of women and men who comprise the early childhood workforce, leaving their contributions unrecognized or, worse, discounted altogether (Fletcher, 1999; Hard, 2008). Advocates have long called for more recognition of the leadership skills that early childhood professionals, especially teachers and providers, develop that go unnoticed by the "acknowledged leadership," primarily administrators and policymakers, who too often have little understanding of the leadership skills developed in working directly with children and families (Hard, 2008; Whitebook, 1997). The hegemony of business discourse in defining leadership for early childhood has left an unjust historical legacy within the profession that prevents many individuals from naming and celebrating their authentic contributions as defining the work of leading and leadership.

Resisting Traditional Leadership Discourse: Expanding Boundaries and Inclusivity

A panoply of voices emerging from within the early childhood field have strived to push beyond the limitations of traditional models to define leadership as encompassing a wider range of the professional skills required for effective work with children and families. Although there is no convergence upon shared definitions of leadership in early childhood, a review of national and international publications provides evidence of the progress that has been made in freeing this construct from corporate and management orthodoxy. For example, leadership is discussed as multifaceted including every role in the profession that includes, but is not limited to, administrative positions (Hard, 2008; Kagan & Bowman, 1997; Ren-Etta-Sullivan, 2010). Different “faces” of leadership have been described including pedagogical leadership (related to innovative teaching practices in early childhood), advocacy leadership (policy/legislation, strategic thinking, and communication with stakeholder groups working on behalf of children and families), community leadership (mobilizing communities to invest in the health and welfare of children, developing coalitions, working towards “collective impact”; Kania & Kramer, 2011), conceptual leadership (having knowledge of the complex field of early childhood as a whole, thinking long term and beyond what is to what might be), and administrative leadership (Educational Leadership Project, 2013; Kagan & Bowman, 1997). Similarly, effective leadership in early childhood has been described as requiring different “wisdoms” including people wisdom, emotional wisdom, role wisdom, and resource wisdom (Henderson-Kelly & Pamphilon, 2000).

Waniganayake (2000) proposed a distributed leadership model for early childhood foregrounding leadership as participatory, decentralized, collaborative, and situated within multiple spheres of activity. This model recognizes that within organizations, there can be many leaders with specified domains of expertise and experience who enact their leadership by organizing and implementing activities to share their knowledge with others. Leaders in this model are defined as those who have access to pedagogical and practical knowledge and are skilled in reflecting upon, analyzing and collaboratively sharing this knowledge in order to empower others. Leadership develops by establishing a culture of learning with an explicit value and encouragement for promoting others’ abilities, strengths, and growth (Sarros & Butchatsky, 1996).

Ebbeck and Waniganayake (2003) discuss many “tools of a children’s champion” that early childhood leaders possess. These tools include knowing how to stay well informed on current issues, understanding relevant legislation and governance structures, and the processes of advocacy and policymaking. Leaders, they suggest, need strong communication skills and a toolbox of effective strategies for affecting change within organizations and the larger field including culturally sensitive approaches to working with multiethnic societies in diverse contexts, knowledge of negotiation strategies, and skills in strategic planning and coalition building. Inspired by Oberhuemer (2000), they also suggest that leadership in early childhood requires taking an international perspective as increasing globalization—resulting in international collaborations, partnerships, and alliances—requires a strengthened skill set in cross-cultural communication, use of information technology, and professional networking.

Using Feminist Poststructuralism, Meyerson's Metaphor of the "Tempered Radical," and Social Justice Discourse to Emancipate Discourse on "Leaders" and Focus the Purpose of Leadership Work in Early Childhood

As outlined, the field of early childhood has made substantial progress in disentangling leadership from specified positions and theorizing that all early care and education professionals have leadership capacities that can be developed and enacted within the context of their daily practice. Despite the promise of these expanded definitions, traditional models that privilege administration and formal authority continue to have wide influence in defining leadership in the profession. As a result, supporting early childhood professionals to develop as leaders involves guiding them to see how traditional models have either privileged or marginalized their professional work while simultaneously introducing them to contemporary conceptual models that are more inclusive of the diverse range of roles and leadership activities represented across our complex field. Additionally, leadership development also requires intentionality in determining as Sinclair (2007) states, "*what all this leadership is for*." Learning to lead in early childhood should become commensurate with a professional commitment to direct one's work towards an ongoing fight for equity and social justice in society. In this conceptualization, assuming particular professional roles or having authority does not ipso facto equate with leadership. Instead, whether administrator, teacher, or policy maker, one enacts leadership by working intentionally to interrupt historical inequities and to engage in work that improves justice and equity for marginalized individuals or groups and underserved communities.

Supporting early childhood professionals to reconceptualize understandings of leadership in these ways requires making visible to them who benefits and who is harmed in traditional models of leadership, introducing them to alternative views of leadership and guiding them in learning to think critically about privilege and disenfranchisement in society. Feminist poststructuralism, Meyerson's (2001) metaphor of the "tempered radical," and social justice scholarship are conceptual anchors that each provides important foundations for doing this work.

Feminist Poststructuralism and Postmodern Perspectives: Discourse, Power, and Signification

Feminist poststructuralism explicates the powerful yet often hidden relationship between knowledge production, power, and discourse in society (Blackmore, 1999; Fletcher, 1999). Poststructuralist inquiry outlines that the process of knowledge production is an exercise of power as certain voices and experiences are heard and privileged as "knowledge," while other voices representing different worldviews and experiences are discounted and marginalized (Foucault, 1980). Poststructuralist theory inspires a critical reflection on "self-evident truths," for example, in societal discussions and definitions of "leaders," "leadership," and "competence" in ways that make visible who benefits, and who is silenced, in the reified process of knowledge construction as it exists. This process reveals how the "truths" embedded within traditional conceptualizations of leadership maintain power within a small group of administrators with the highest levels of formal authority, whereas alternative models of leadership proposed by early childhood scholars—e.g., faces of leadership, tools of a child champion, and distributed leadership (Ebbeck & Waniganayake, 2003; Kagan & Bowman, 1997; Waniganayake, 2000)—challenge the inequitable marginalization of early childhood professionals' work, reclaiming it as valuable and central to definitions of leadership enactment.

Poststructuralism is also valuable for bringing attention to the process of "signification" (i.e., how individuals are named through such signifiers as "family child care provider," "policymaker," or "leader") and the highly political process in which ideology shapes the meaning and power we attach to these signifiers. Language, and the act of representing experience or signifying it, is a "powerful means of constructing an ideological worldview that furthers the interests of particular dominant groups" and sustains particular hegemonic power relationships in society (Fletcher, 1999, p. 23). This is taken up by Chappell (2010) who describes how dominant groups engage in "colonizing the minds" of non-authorized identities and voices by transferring values and beliefs through narrative structures and performances intended for their consumption (p. 11). Lukes (1974) describes this as the "unobtrusive exercise of power" where those who have been traditionally silenced begin to "internalize, accept, and give voice to dominant thinking" (Fletcher, p. 17) as seen with early childhood professionals who routinely separate their professional work from definitions of leadership.

Feminist scholars explain that naming and giving voice to one's experience is the first step in learning about domination and how it functions (Wright, 1998) and knowing one's positionality acts to galvanize individuals into action as increased self-awareness of one's positioning (i.e., inside or outside the boundaries of "leadership") inspires "moral action to enhance our subjectivity and that of others" (Monchinski, 2010, p. 131; Oliver, 2002). Thus, the bifurcated process of learning how one has been signified while also learning to give voice to one's personal experience can be a powerful catalyst for early childhood professionals in learning to critique, resist, and reauthor their positionality.

"Tempered Radicals" Instigating Change from Center Stage to the Periphery

Increasing equity in discussions of the enactment of leadership requires recognition that early childhood professionals affect change through a comprehensive continuum of tactics and strategies ranging from public pronouncements to covert actions in resistance. Meyerson's (2001) description of the "tempered radical" is useful as she defines them as “operat[ing] on a fault line…organizational insiders who contribute to and succeed in their job,” yet continuously work to insert “ideals and agendas that are somehow at odds with the dominant culture” (p. 5). Tempered radicals live with a continuous tension between conformity and rebellion, and they engage a spectrum of strategies to inspire positive change varying according to their intended scope of impact, from a few people to the provocation of large-scale learning and change, and their level of visibility, from public and pronounced to stealthy and covert. While some actions are almost invisible and, therefore, do not result in strong opposition, others manifest more publicly and incite strong resistance and disapproval. The promise of Meyerson’s continuum ranging from “resisting quietly and staying true to one’s self” to “broadening impact through negotiation,” “leveraging small wins,” and “organizing collection action” is the inclusivity in defining how individuals contribute to social change. Meyerson’s theoretical understanding of change is emergent and continuous, responsive to “little prods” that catalyze adaptation versus episodic and dramatic transformations. Her view of organizational and social change

> Makes room for lots of normal people to effect change in the course of their everyday actions and interactions. It is an inclusive model that sees people on the margin as well as the center making a different in a wide variety of ways. Change agents are not just those characterized by bold visions and strategic savvy, but also those characterized by patience, persistence, and resourcefulness. In this model, change agents are sensitive improvisers who are able to recognize and act on opportunities as they arise. This view of change and change agents is less dramatic, less inspiring and less breathless than portraits of grand transformation and revolutionary leaders. It is also more inclusive, more realistic and more hopeful for most people who care to make a difference in their worlds. (p. 13)

Meyerson’s theory also describes personal actions as the starting point for affecting change. When individuals’ actions express valued parts of themselves (e.g., their value as early childhood professionals), they materialize these aspects of who they are, reinforcing to themselves and others that they will not be silenced nor allow themselves nor their potential to be defined by the dominant culture. Taking action allows individuals with similar social identities and values to “find one another,” develop relationships, and build broader coalitions in working for change. Actions also lead individuals to feel an increased sense of efficacy, even if the difference they make must be catalogued as a “small win.” This strengthening of personal efficacy often leads to increased motivation to look for opportunities to act. Meyerson’s conceptualization of leadership as embodying a continuum of strategies for change provides an inclusive space where the contributions from a range of early childhood professionals working across diverse sectors and wide-ranging roles can be named and celebrated as leadership.

Social Justice in Early Childhood Education: Amplifying a Discourse

Social justice has been defined variably as beliefs that focus on care, justice, respect, and equity issues (Marshall & Olivia, 2006), having self-knowledge as well as deep appreciation and understanding for others’ viewpoints, perspectives, opportunities

(Darling-Hammond, French, & Garcia-Lopez, 2002), and fairness (Rawls, 1971) and working for “what we believe ought to be” (Greene, 1998, p. xxix). Inserting social justice front and center into our discussions of leadership in early childhood ushers in an urgency a collective focus that points a spotlight on inequalities that demands attention, action, and active imagination from all who work within the early childhood profession. Social justice discourse acts to break the silence of unspoken dialogues by commanding forward “courageous conversations” that require collective engagement, speaking truths, experiencing discomfort, and expecting and accepting non-closure (Singleton & Linton, 2006) in a continuous struggle to focus on and improve the life circumstances for “those who have the least and those whose rights and entitlements are being ignored or violated” (Fennimore, 2011, p. 4). Thus, foregrounding social justice transfixes an unwavering focus on major structural inequalities while maintaining an unrelenting goal of transformation (Van Hoorn & Levin, 2011).

Social justice frameworks influence a bold line of questioning for the field including:

- When defining what we mean by “leaders” and “leadership”; whose skills, knowledge, and capacities are made visible and celebrated; and, inversely, who is left unacknowledged, in the margins, and silenced in these definitions?
- When working on behalf of children and families, whose cultural values and beliefs are shaping the discussions? How are these values and beliefs similar or distinct from those who are being represented and influenced by these discourses and actions?
- Who is missing from decision-making tables? What actions are being taken to increase diversity of perspectives and participants in policy and decision-making?
- How are children and families empowered or disenfranchised by particular programs, policies, legislation, and research projects? What steps must be taken to disrupt and reverse the process of those that are suffering?

By asking such questions and placing social justice as a central value in conceptualizations of leadership, we actuate agendas that otherwise remain unnoticed or hidden and, through work avoidance or lack of courage, neglected. Leadership that works from a social justice agenda inserts a human rights discourse when discussions of the value of early care and education are singularly framed by instrumentalist cost-benefit discourse recognizing that children are “rights bearers” and that public investment in children’s health, education, and well-being is a human right validated in international human rights conventions. Leadership within a social justice framework increases awareness of the mechanisms of oppression—including racism, sexism, classism, ableism, heterosexism, linguistic privilege, and religious discrimination—and how they persevere in programs, organizations, and within society while simultaneously expanding knowledge of the resources and strategies that can be drawn upon to disrupt these realities. Valerie Polakow’s decades of field research exemplifies both of these aspects of social justice-oriented leadership in the field of early childhood. By documenting how poor women (and their children) routinely have their rights violated through inequitable policies that prevent them from accessing child care, post-secondary education, and welfare subsidies, she has used her research to leverage positive changes to better protect and support single impoverished women and their young vulnerable children (Polakow, 2007, 2011; Polakow, Butler, Deprez, & Kahn, 2004). Leadership work in this sprit, emphasizing the advancement of equity and social justice for children, families, and communities, must become the central focus of a reconceptualized definition of leadership for our profession. It is not enough to move definitions beyond particular roles and formal authority; we must be able to answer what all of our collective leadership is for.

Conceptual Anchors for a Reconceptualized Leadership

Early childhood professionals must learn to work within systems as they exist while also strengthening their ability to successfully resist, reimagine, and reassemble these systems in ways that are more equitable and just. This process can be advanced by inserting discourses rooted in frameworks of social justice and postmodern epistemology that value courageous questioning, the process of destabilizing dominant discourses and recognition of a continuum of options for accomplishing social change. To become effective change agents, early childhood professionals must gain knowledge of the complex systems that comprise the profession in which they work and be supported to discover how individuals and groups (e.g., child care providers, preschool teachers, administrators, policymakers, low-income families, and children) are politically positioned within these systems. Most importantly, they must gain tools and strategies they can use in authoring or materializing (Davies, 2000) disenfranchised individuals and groups into more equitable futures. Thus, central to social justice-oriented leadership education is first learning to see how deficit discourse has been historically used to marginalize and oppress individuals, families, and communities and then learning how to interrupt and replace inequitable signification with capacity-framed discourse that emancipates work from the margins.

Scaffolding Leadership Development: Postfoundational Pedagogies to Inspire Transformation

There are multiple layers of complexity involved in working to empower early childhood professionals, so they take risks to insert their voices, bodies, and lived experiences into new arenas while also making visible for them the challenges and resistance they will face in attempting to reframe leadership towards inclusivity, equity, and social justice for the field. The next section introduces a sampling of pedagogical strategies that I have used to accomplish these goals with graduate students enrolled in an early childhood leadership program designed for full-time working professionals in ECE situated within an American institution of higher education. These pedagogies were created to scaffold students in learning to increase their perceptions of themselves as leaders, to expand their enactment of leadership actions in a wide range of professional contexts, and to strengthen their focus on becoming leaders for social justice.

Re-performances of Statewide Policy and Other ECE-Related Organizational Meetings

Practitioners learning to insert their voices into federal-, state-, and local-level policy meetings face a context where the discourses used, the participation formats allowed, and the political alignments among "players" are unfamiliar and often intimidating. Teaching students about the mechanics of these meetings (where they take place, the names and roles of the participants, translation of acronyms) is a necessary but not sufficient curriculum to prepare them for active participation. A critical first step is teaching them to understand and analyze how the production of knowledge unfolds in these meetings, a foundation necessary before they can engage in "sous rature," Derrida's (1976) idea of going "under erasure" where taken-for-granted readings of the world (e.g., the absence of teacher or child care providers' voices in policy discussions) can be crossed out, displaced, and thought differently (Lenz Taguchi, 2008). I have found that re-performing and "textualizing" these meetings in class in a manner that allows for simultaneous "freezing" of particular interactions for deconstructive analysis, the students are provided with valuable texts for analyzing the various ways in which language and other forms of representation (e.g., nonverbal cues, text, graphics, and/or auditory input) mediate the relationship between power and knowledge construction.

Stakeholder Presentations

This activity engages early childhood professionals in advocating for a change they think is "worth fighting for" in front of their colleagues who are role-playing specific stakeholders (e.g., school board, legislators, state-level policy commission members) holding the decision-making power to enact these policy changes. Designed as a "practice run" in learning as they prepare to expand their voices into public arenas, this activity is inspired by performance theory (Butler, 1993; Schechner, 2002) and Chappell's discussions of "embodiment" in cultural performances as a process for socializing specific identities. In these performances, power is enacted through "physicalization" as students consciously "embody" a character (or themselves as character) with that character's "controlling knowledge, beliefs and values" (p. 8). For in "*becoming* the other—in a limited capacity and for an isolated period of time—the performer learns what it is to be the other, and makes choices about his or her identity-in-role" (Aristotle, 1989; Chappell, 2010, p. 5). For example, in speaking behind the microphone as both expert presenters on a variety of current topics central to their field (e.g., state and federal budgets, quality rating and improvement systems, aligning preK-3rd grade curriculum within public school systems) and key stakeholders (e.g., school board members, city supervisors, state legislators, business executives, philanthropic donors), students are offered a safe place to practice inserting their voices in new formats before taking risks to do so in a more public, and authentic, arena. This experience provides students with discursive space to rewrite normalized dominant meanings (who sits at these tables) destabilizing their further omission and allowing them to "embody a future self" who inserts their voice into a variety of stakeholder meetings.

Leadership Interview Project

Students complete two brief interviews with individuals that they perceived to be leaders: one working within the field of early childhood and one employed in a different disciplinary context (e.g., nursing, business, medicine, law, engineering, prison reform). They develop a range of questions (e.g., what has been the biggest obstacle/challenge to your leadership development and how did you overcome this challenge? What successful strategies have you used to mobilize people in your organization or to build coalitions?). A digital wiki page (www.pbworks.com) provides a context for sharing the data with students and interviewees and invites reflection on the aggregated findings. This project was developed in order to help the students see a wider range of "truths" about leaders and leadership that are too often masked by the traditional discourse. By collecting and analyzing a diverse array of personal stories from many individuals about their experiences with leadership, students considered what Sinclair (2007) describes as the "critical alternatives to dominant accounts of leadership."

Audio Perspectives

This assignment highlights the sensory insertion of "voice" into the classroom space by using 2 min audio-recorded self-reflections where the students described what they had learned about leadership over the course of a year. These audio recordings are played back to back for everyone in class to listen to and discuss, and I use them to inspire a deconstructive critique about the personal act of "doing leadership" (Sinclair, 2007) in early childhood. Use of the digital format is an intentionally political choice to challenge the privileging of text-based constructions of knowledge, instead, giving space for "new literacies" in the classroom (Leu, O'Byrne, Zawilinski, McVerry, & Everett-Cacopardo, 2009).

Rhizoanalysis: Exploring the Politics of Discourses of Power

Rhizoanalysis (Deleuze & Guattari, 1987; MacNaughton, 2005) is a method that employs intertextuality, linking a target text with others, to produce new meanings and to challenge the politics of the dominant ideology reflected in the target text.

Authoring Leadership Inclusively and Learning to See Leadership as Enacted for Social Justice: Self-Discoveries and Reverberations in the Field

I now turn to descriptions of the early childhood professionals' engagement with these pedagogies and selected stories of the ripples and reverberations their increasing participation and leadership actions initiated within the field. All of the early childhood professionals represented in these stories were enrolled in the leadership program between May 2009 and June 2011. Students in this program represented the diversity in the childhood workforce; 89 % were female, 50 % identified as students of color, 1/3 were multilingual, approximately 60 % were first-generation college attendees, and 75 % were the first in their families to attend graduate school. Abbreviated portals are offered into the dynamic-evolving artistry of their leadership development (Austen, 2010) as they made self-discoveries, managed tensions, and learned to engage in creative resistance in authoring new understandings of leadership.

Self-Discoveries

When discursive spaces were created for these professionals to unpack, trouble, and reformulate concepts of leadership and their personal relationship to the act of leading, they made important personal discoveries. Eva, a family child care director, explains in her audio perspective how her increased knowledge of the field and the inclusive approach to leadership she learned about in class led to "finding her voice" and inserting it in new contexts within the field including her attendance at policy meetings, engagement with her congressional representative, and discussions with the local health department in "problematizing" the required use of bleach due to its toxic health effects for family child care providers, an action that led the health department to a change in policy for providers across the large urban city in which she practices.

> The leadership class confirmed me, a family child care provider as a leader, and helped me find my voice. I know the importance of taking a stand and being heard and seen in early care. I count! My voice counts! I must lead and guide others to this realization, helping and assisting them to find their voices. I now know what most of those ECE acronyms mean and why political bills are important and how they come about. Since participating in this program, I have attended and understood more policy meetings, for the first time I have written a letter to an Assemblywoman, and agreed to be an active member of the Family Child Care Association. I now understand and have shown the power of quiet resistance and leveraging small wins when challenging the use of bleach in an ECE setting.

Michelle describes her experience of learning to speak back to the dominant discourses in society that were acting to narrowly define the "performance of leadership" reified through consumption, expensive clothing and cars, and particular expressions of "authority" behaviors. In destabilizing this assumed reality about leadership, she was able to "walk the fault line" (Meyerson, 2001), appropriating the rules of the dominant game while also troubling it through her own actions to interrupt the process of her disappearance and to consciously work on being seen.

> In my leadership role, it is expected of me to "show that I am the boss". I must dress the part (hence, my white button down) and to behave with authority….During many evaluations, I was told that I was unprofessional, had no personality or seemed cold….It was appalling to think that I was being judged based on the way I "looked" instead of evaluated on my work practices. There are times when I feel pressured by my organization to be the leader they want me to be. To always smile, say the right thing or even wear the right pair of shoes… Do I have to wear this mask and teach my staff to do the same?…I have taken off the mask. I have taken chances, [taken] control and have created an environment that *sees* me. I am no longer invisible. I have learned to play the game and be the person they want me to be without losing my identity. I stand with many hats and have learned to use them wisely.

Other individuals discovered narratives circulating within their organizations that made visible to them how they were being signified, and their professional skills, knowledge, and contributions represented in ways that sustained inequitable power relationships. As Kristen explains, this recognition inspired her to disrupt the process of being represented by others by repositioning herself as a subject and re-signifying the associations of power attached to her professional work.

> At [my organization], there is a story told over again about how the child care work is not as valid as the [other] work. Both sides fuel this theory due to the fact that, although sustainable, the child care work doesn't raise much unrestricted revenue. The [other] department has the ability to raise revenue to sustain salaries… Many times child care is ahead…in terms of innovative programs….I began talking with my manager about the need to tell our positive stories over and over until [the organization] understands our work. My manager asked me to report…at the next meeting. As I reported, colleagues learned things about my programs they had never heard before. A shift was created as [the organization] began to recognize our strengths and how important the child care work is. Even if it doesn't generate revenue, it generates practical applications and understanding of direct community work. In addition, I now have a direct relationship with other staff [in the organization] and can talk with them about the exciting work we are doing, thereby increasing our positive stories and importance.

As Lenz Taguchi (2008) describes, poststructurally inspired teacher education repositions the learner's personal narratives as central to their educational process as students do not arrive with an "empty toolbox needing to be filled with educational theories and methods, but rather with a toolbox *already filled* (and continuously filling itself), with tools needing to be unpacked, investigated, and reformulated" (p. 55). As with Monica below, many classmates learned to listen to their own stories as essential material for their professional growth and, in this case, their leadership development.

> I had never imagined that I would use my own life, upbringing, development, current work, parenting styles and knowledge of the field to inform my personal leadership development. I always assumed that your style of leadership was based primarily on the "way things have always been done", textbook theories of child development, traditional notions of teacher directed activities and the status quo.

Traditional hierarchical discourses were challenged as early childhood professionals deconstructed the construct of leadership. Laurel, a Head Start Family Advocate, expresses how she came to challenge hierarchical "masculine" models of leadership that privileged "profits" and "quick results" as out of alignment with the early childhood profession. In juxtaposing these competing narratives of enacting leadership, she was able to rethink the process of improving her leadership by recasting leadership actions through a relational lens.

> I have started to realize that a leader in early childhood education is different than a leader in business. A businessman can show a profit with direct and powerful numbers in three to six months. However, a leader in early childhood education cannot provide any profit in a short period of time….The development of a human relationship is a very important issue in the ECE field….my first year at Head Start there was low parent attendance and I thought I could get more participation by making the monthly workshops and meetings mandatory. After I finished many readings, I started to rethink how I could improve my leadership in order to increase the parents' attendance and one way was to spend the year developing relationships with the families…. As a result, my parent workshop attendance has gone up. Based on my position and leadership level, I have realized that providing love and care is the essential way to develop leadership with the Head Start parents. Developing a relationship needs time.

And these professionals learned that inserting their voices into decision-making circles with a goal to inspire change did not require them to be in positions of authority. In the following example, Haley juxtaposes the lack of formal authority she was perceived to have (as a preschool teacher) with her ability to insert her voice and to make visible an unspoken dialogue within the local policy council where she volunteers.

> One practice that I am trying….is leading without authority…I teach preschool and have an untitled part-time position with Head Start. Another new practice for me has been addressing work avoidance. When work is controversial or threatening, people tend to avoid it. Dual language learner work is both controversial and threatening. It was clear to me that our group would need to acknowledge that we are initiating a movement that will be politically contentious. We need to prepare ourselves for what is to come. When I did not hear this message from the group members, even though they have more experience in this area and more formal authority, I chose raise the issue. Though some people were not yet ready

> to acknowledge the barriers we will face in this work, others were. By raising the issue, I developed allies in addressing work avoidance. Not all of my attempts to try out new practices have been successful, but I will continue to try and continue to learn.

Rhizoanalysis supported early childhood professionals to engage in a political critique of the production of power as belonging only to a limited group in positions of authority who reify values of individualism and marketplace competition. Through intertextual analysis, power was held up for critical analysis. To begin, students read an excerpt from Pfeffer's (2010) book, "*Power*: *Why Some People Have It and Others Don't*," reflecting dominant views of power where world is a "tough system" that requires "survival skills" and individuals must know the rules to succeed. Below is an excerpt from the introduction.

> "Jeffrey, it's a tough world out there," Beth said. "People take credit for the work of others. People mostly look out for their own careers, often at the expense of the place where they work. The self-promoters get rewarded…I guess I haven't been willing to be mean enough or calculating enough or to sacrifice things I believed in order to be successful."…Jeffrey responds, "So welcome to the real world—not necessarily the world we want, but the world that exists. It *can* be a tough world out there and building and using power are useful organizational survival skills…rivalry is intense and only getting more so…Some of the individuals competing for advancement bend the rules of fair play or ignore them completely. Don't complain about this or wish the world were different. You can compete…if you understand the principles of power and are willing to use them. Your task is to know how to prevail in the political battles you will face. My job in this book is to tell you how."

After reading this text, the students worked in small groups to link it with ideas gleaned from feminist poststructural discussions of power (e.g., MacNaughton's *Journeys to Activism: Becoming Poststructurally Reflective About Truth* and Sinclair's *Journey Around Leadership*). Using the tools of rhizoanalytic thought, early childhood professionals were able to explore the politics of the various texts by exploring how each one "organizes meanings and power" (MacNaughton, 2005, p. 210). For example, they analyzed the ethical consequences of different definitions of power, whose interests were being served in each conceptualization, the role of doubt and uncertainty in these definitions, and learning to "see" what was concealed and asking, "why is that so?" As the assumptions of power within the dominant [Pfeffer's] text were made increasingly visible to them, they came to see how they, as early childhood professionals, were too often positioned *outside* of the boundaries of power in this social production of it. In working to resist and even reject this inequitable signifying of their potential, discursive spaces were created for them to argue back to the assumptions underlying the dominant discourse. They used their personal experiences and the feminist readings to inspire their spoken and written responses. One individual wrote, "One versus many. Shared vision. Which is stronger? Who will get more done?" Another began with a quotation from Pfeffer, "It's stated that managers primarily concerned with power are the most effective in accomplishing their jobs" and followed this truth with a set of provocative questions, "But what is the bigger picture of the organization, the other people? What are the larger implications of this kind of behavior outside of short-term results?" Still another wrote across the bottom of the poster, "I DON'T WANT TO PLAY YOUR GAME!" Several wrote short statements of discontent, "Moral Leadership does not equal controlling and manipulating others" and "Personal success and gratification is not a reason for leading." Finally, one professional wrote with intensity, [quoting from Pfeffer] "Don't complain about this or wish the world was different." "WHY??? Why can't I complain AND make this world different? Can we be politically savvy and not manipulative to others and invite collaboration?"

This process supported students in learning to disrupt reified and inequitable definitions of power and leadership as accessible to only a privileged few who are willing to sacrifice their personal beliefs and integrity in the process. Blackmore's (1999) discussion of power as the ability to act with others and support them in doing things, Fletcher's research into the power of relational leading, and Sinclair's (2007) continuum with high and low voice strategies for exercising power and leadership provided them with critical alternatives for exploring the politics of the dominant views of power that too often marginalize early childhood professionals. Reframing power through these lenses allowed several students to stop from "disidentifying" (O'Loughlin, 2001) themselves with dominant discussions of power and to imagine themselves as relating to power and authority in ways that aligned with their personal values and beliefs. In their final reflections after this activity, several students described the importance of power being used to "empower others," "create spaces for collaboration," "not needing to know all the answers to have power," and "leadership and power [being] shared and…fostered within *and* between individuals." This rhizomatic analysis inspired freedom for these early childhood professionals to see power as accessible and dynamic and developing through relationships.

The leadership interview project was a very effective format for helping early childhood professionals to see that their capacities and vulnerabilities were similar to individuals they perceived to be leaders in the community. Aggregating the interview data and analyzing it for the emergence of common themes allowed them to discover that journeys to leadership were human endeavors that entailed the full continuum of emotions and vulnerabilities reflected in any learning continuum. Permeating the construct of leadership with human narratives of realism allowed individuals to contest metanarratives in society that project leaders as invulnerable beings with all the answers. As Jonake remarked, "It was noticed that the leaders in their early stages of leadership felt the lack of self esteem, had a fear of speaking in public, but with time and practice, gained confidence." Rebecca learned that "leaders do not necessarily have all the answers nor do they need to be the front runners in all that they do," and Talia explained that her reading of the data suggested the importance of "accept[ing] ourselves and recogniz[ing] our shortcomings, so that we can use our strength to move forward without false pretense or apology for who we are." Naomi explains how looking at the data for this project helped her to challenge the dominant mental models that equate leadership as exclusively the domain of individuals with certain traits.

> [I learned about] some attributes I had never considered as "leadership" qualities…"striving for diversity" and "making sure all voices are heard". I really liked that she [my interviewee] framed them as important qualities of leadership…we are so accustomed to hearing leadership framed in terms of personal attributes—not as part of a collective whole. It made me notice my default mental model—and awareness is the first step to making change.

The leadership interview project supported early childhood professionals in learning to view leadership as a relational, dynamically constituted construct inclusive of their various roles and the diverse ways that leaders inspire positive change in their professional work.

Focusing Leadership on Equity and Social Justice

Examination of the complex relationships between discourse, power, privilege, and oppression in society inspired professionals to focus their leadership efforts on addressing pressing social justice issues within their work. For example, Petra used courageous questioning and the act of naming silenced dialogues (Delpit, 1995) to create ripples of change within her large urban city's discussions of quality in early childhood settings. Multiple stakeholders and agencies were involved in developing a quality improvement system to expressly improve the level of quality in child care centers and preschools across the large urban city where she worked. Ironically, the child care centers rated consistently as the lowest in quality were also the *least* likely to receive targeted quality improvement funding and resources as centers needed to receive a certain score to quality for the improvement program. Petra began to repeatedly raise for public scrutiny that fact that the quality improvement system, as it was being developed and implemented, was serving to reinforce, not ameliorate the marginalization of children living in the city's most underserved communities. By repeatedly pointing out the structural inequality built into this system, Petra was insisting that policymakers consider who was gaining and who was being harmed in the system as it was being implemented. Petra's work to insert an ethic of social justice into policy discussions took tremendous courage and often left her feeling frustrated by the lack of public will to examine how racism and classism was being reinforced in the city's emerging quality improvement system. Petra maintained her persistence in enacting her leadership for justice by drawing on the comprehensive continuum of tactics and strategies available to a tempered radical at work. At times she worked covertly to subtly shift discourse within stakeholder meetings while other strategies were more public and broad based as reflected in her decision to create and facilitate a "quality committee" allowing a space for stakeholders from across the city to engage in long-term discussions about what it meant to "increase quality" in early childhood settings.

Another example of leadership enacted for social justice is seen with Patrick whose goal was to create a welcoming and inclusive environment for lesbian, gay, bisexual, and transgender (LGBT) families in the child development center where he worked. Using a human rights discourse, the right that all children have to feel safe and respected in their school community and that family is a foundational element informing children's identity and sense of security in the world, Patrick worked to insert a value within his organization for respecting the human variation in family structures including all of the LGBT families enrolled at his center. Recognizing the profound impact that professional development devoted to this topic could have for shifting beliefs and practices within the wider field, Patrick decided to use his strengthened knowledge of advocacy to inform a presentation for the board of directors overseeing the large management company responsible for administration of his center. He passionately spoke to the board about the importance of creating high-quality early learning environments for young children and the connection between quality and inclusivity. In response, the board provided Patrick with funding to facilitate workshops for 500 employees within the organization, including board members, administrators, teachers, and teachers' assistants, on using a curriculum titled, "Making Room in the Circle – LGBTQ" designed to create early learning contexts that support, welcome, and respect LGBT families. As a result, Patrick spent a year providing weekend workshops for directors knowing that they would each return to their centers with an expanded repertoire of resources and strategies for interrupting the disenfranchisement of LGBT families. Patrick's leadership sought to shift LGBT families' personal narratives and experiences from the shadows into the center of public discourse being circulated within early learning classrooms as part of a larger project in valuing and normalizing human diversities.

Ethan, having previously worked as preschool teacher and preschool director and now working exclusively within a policy arena, worked to reverse the silencing of practitioner voices in the very policy conversations that could be greatly informed by their knowledge and perspectives. His realizations about the chasm between providers and policymakers led him to resist and realign these inequities within his organization. Significantly, he proposed and enacted important changes in the policy meetings he organized to make them more inclusive of early childhood professionals including physically arranging the room for more collaborative dialogue, translating the acronyms used, and adding index cards for participants to insert their questions and comments and voices directly into the conversation. Ethan also began to question the underlying power distribution in the policymaking process. He began to talk about a "learning gap" that had to be bridged by practitioners *and* policymakers.

> [there is a] 'learning gap' that needs to be bridged before practitioners are able to participate fully. This gap exists amongst both providers and the local planning councils [policymakers]…For practitioners, an understanding of ECE funding and programs, state and city budgets and policy, and ECE acronyms, are necessary tools for them to have in order to become involved in a meaningful way. This information needs to be made readily available and offered to providers regularly and freely, in a straightforward, accessible way…It is important for council members to recognize that it may be the way that discussions are actually being framed at the meetings that makes issues like these inaccessible to providers. For the planning council members, knowledge is gained by directly hearing from the practitioners themselves, and learning and understanding more about the impact that policy, planning, and budget issues and decisions have on direct service providers, and the children and families they work with.

Ethan also challenged the assumption that making policy meetings "accessible" to early childhood professionals, that is, holding them during evening hours, finding ways to advertise these meetings to provider groups, was an equitable distribution of power. He contested the idea that simply having early childhood professionals physically present at the meetings equated to their meaningful inclusion “at the table” where decisions are made that ultimately impact their daily work. In this way, he called for an examination of the system as it existed, a system that has historically left providers’ voices in silence.

> I have shifted my belief that engaging practitioners only involves making it possible for them to physically attend and participate in the local planning council and other citywide ECE meetings. It may be more useful and appropriate to determine new and innovative methods to get important ECE updates and information to practitioners in their own programs, homes and communities, and alternative means to encourage input and feedback, rather than focus mainly on how to increase their attendance at meetings…the local planning council, and me as staff to that body, needs to establish meaningful links and relationships with citywide associations and neighborhood groups for providers, through which a means of providing information in both directions can be established…and this information should be prioritized and filtered to include those issues most relevant to the lives and work of the practitioners themselves.

In a final example, Deborah, who worked at a child development center on a large college campus, used her increased knowledge of the intersection of discourse and power to interrupt the language used by college officials to signify her staff as “nursery aides.” Contesting the manner in which her staff was being marginalized, Deborah persisted in advocating that the employees at her center be signified in all formal documentation and informal communication with discourse that accurately represented their professionalism “teachers” and “educators.” She used this “small win” as a leverage point for negotiating a 30 % increase in their compensation rates. Deborah also worked to raise the visibility of the work unfolding at her center by working with her staff to apply for a very prestigious national diversity award, an honor that her center received. Her unflappable persistence in pointing a spotlight on the conditions requiring critique and transformation was critical. Not only did she instigate changes that reinforced public messages of respect and recognition of early childhood as a profession, she also inspired her classmates and colleagues to believe in the power of personal agency to bring about social change within large, seemingly intractable, institutions.

Emancipating Conceptualizations of Leadership for Early Childhood

> *Tempered radicals inspire change. Yet their leadership resides equally in their capacity to inspire people. They inspire by having courage to tell the truth even when it’s difficult to do so and by having the conviction to stay engaged in tough conversations. They inspire by demonstrating the commitment to stay focused on their larger ideals even when they suffer consequences or get little recognition for doing so. Their leadership does not rely on inspiring through periodic heroism and headlines. Their leadership inspires—and matters—in big and small ways every day.*
>
> —Debra Meyerson, 2001, pp. 175–176—

The need for leadership development in early childhood is growing as future systems building will require individuals who deeply understand the complexities in designing facilities, programs, research, and policies that are responsive to the increasingly diverse needs of children and families in our nation today. Developing a new generation of leaders who emerge from, and represent, the field requires that we author new concepts of leadership reflective of the "human capacities widely distributed" within our profession (Hemley & Carini, 2000), an important step in increasing public awareness, value, and respect for the complexities of early childhood work. It is essential that we continue to disrupt traditional corporate discourse from framing our conversations and recognize the diverse spectrum of leadership actions taken from the center to the periphery of our field. In acts of silent resistance, speaking truths, asking courageous questions, sharing information and resources, building coalitions, administrating programs, and intentionally subverting dominant, and inequitable, discourses, early childhood professionals are expressing their leadership in covert and bold fashion. Expanding conceptualizations of leadership cannot stop at expounding its diversity. As a field we must collectively examine our purposes for leadership and combine the courage to make visible structural inequalities with actions that destabilize, reimagine, and transform possibilities for a more equitable and just future—intentionally, passionately, every day, resolute with hope.

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Chapter 61
At the Intersections of Black and White: Defining Social Justice from Different Perspectives

Gretchen Givens Generett, Jill A. Perry, and James E. Henderson

The Context

After a unanimous vote by the University Council of Educational Administration's Executive Committee, Duquesne University's proposal to establish its own UCEA Center for Educational Leadership and Social Justice was accepted in February 2009. The University Council for Educational Administration (UCEA) is an international consortium of over 80 prestigious research universities committed to advancing the preparation and practice of educational leaders for the benefit of children, schools, and society. UCEA, as a consortium, symbolizes an important aspiration—advancing significantly the field of educational leadership through interinstitutional cooperation, communication, and contribution.

When UCEA selected the Duquesne University to house the UCEA Center, it became one of only eight UCEA centers in the world. The center is uniquely positioned at Duquesne in that the founders and owners of the University, the congregation of the Holy Spirit, have an expressed imperative to make themselves "the advocates, the supporters, and the defenders of the weak and the little ones against all who oppress them," and whose University mission is "to serve God by serving students."

The primary focus of the UCEA Center for Educational Leadership and Social Justice at Duquesne University is to investigate the relationship between educational

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leadership and social justice. The School of Education faculty, with the support and encouragement of Dean Olga Welch and Dr. Rick McCown, then Chair of the Department of Educational Foundations and Leadership, proposed to investigate the relationship between educational leadership and social justice critically, comprehensively, and collaboratively.

Critical investigation of the relationship means rigorous interrogation of the assumptions that underlie the practice of educational leadership and the formation of educational leaders who take action in their own lives and in cooperation with others to effect positive social change. Comprehensive investigation per their thinking means investigating the relationship within and across the complex contexts in which educational leaders practice and are formed, the theoretical and empirical antecedents that operate in those contexts, and the theoretical and empirical consequences of practical efforts to identify and resolve issues of social justice. Similarly, collaborative investigation means investigations that include and address practitioners, researchers, and policy makers from diverse scholastic, academic, community, and government institutions. These are matters that have relevance for educational leaders, aspiring leaders, and those who prepare them around the world.

The first director of the UCEA Center for Educational Leadership and Social Justice was James E. Henderson, a professor in the Department of Educational Foundations and Leadership, former Dean of the School of Education and Director of the Interdisciplinary Doctorate in Educational Leadership. During the 2010–2011 academic year, he invited Gretchen Givens Generett, a colleague from the same department to join him as codirector of the center. This chapter explores the manner in which individual narratives and lived experiences have shaped how two academics understand social justice and, subsequently, how they collaborate professionally to engage the ways in which social justice frames educational leadership preparation and practice. Jim is a white male raised in the North who came of age during the 60s as a first-generation college student from a steel town working class family. Gretchen is an African American female who was raised in the South and was part of the first generation to benefit from the Civil Rights movement of the 1960s. As they came together to codirect the University Council of Educational Administration Center for Educational Leadership and Social Justice at Duquesne University, each recognized that, while different, their understandings of social justice have been shaped largely by their racial, ethnic, and socioeconomic experiences and by the modeling of those closest to them. As a result, Jim and Gretchen have worked together to bring the richness of their experiences to benefit the goals and missions of the center. Interviewed by and cowritten with Dr. Jill Perry, this chapter demonstrates the importance of perspective and framing, not only in an individual's understandings of social justice but also their role of each in teaching about social justice to future educational leaders. Connecting similar themes in two very different life histories, this chapter argues for educational leaders to seek out dialogical relationships that push their own understandings of social justice in action.

Bill Moyers, an American journalist and public commentator, served as White House Press Secretary in the Johnson administration. Moyers had an extensive involvement with public television, producing documentaries and news journal programs. He won numerous awards and honorary degrees. He became well known as an incisive critic of the US media. Additionally, Moyers was the President of the Schumann Center for Media and Democracy. Moyers once famously opined that, “Talking with people who agree with you is like jogging in a cul-de-sac.”

The constituents of the UCEA Center for Educational Leadership and Social Justice believe that it is vital to communicate and collaborate across *all* cultural, gender, racial, and other chasms of difference that would serve to divide rather than unite. From that perspective and from a common bond of wanting to enhance learning experiences and outcomes for *all* students, Gretchen Generett and Jim Henderson have attempted to model the sharing they want to encourage in their own students and with their own peers. Effective communication leads to understanding, effective communication leads to trust, and effective communication leads to action. All three imperatives—understanding, trust and action—are necessary if the UCEA Center for Educational Leadership and Social Justice is to realize its Mission “to advance equity and excellence on behalf of young people, especially those who have been marginalized, mistreated, and neglected.” We believe it can be accomplished.

The Changing Same: Connections Across Difference

When Gretchen and Jim invited me to participate in this project, I had no idea how we would write the story of two seemingly opposite members of our faculty coming together to build a center that serves as the hub for merging leadership and social justice. I’ll admit, as a new member to the faculty, I didn’t fully understand why Jim was the first director nor how he had selected Gretchen to codirect. What I did understand was that this was an opportunity, so I agreed.

This chapter is a classic example of judging a book by its cover and then upon reading it anyway, finding the story is a keeper for generations to come. As I interviewed Gretchen and Jim, I found myself engrossed not only in their individual narratives but also the immediate overlapping and intertwining of their stories. Several common themes—self as “different,” the role of family, and education as escape—emerged from their individual narratives and brought them together in similar personal missions and work that will frame the mission of the UCEA Center for Educational Leadership and Social Justice.

As young people, both Gretchen and Jim were aware that they were different from their peers. They were each sensitive to racial and socioeconomic injustices and were inclined towards kindness and the helping of others. In each of their stories, they identify their families and upbringing as primary influences on their worldview. Each of their families was close knit and they both identify key family members who modeled equity, as simply as treating all people with human dignity, in their everyday lives. As a result, both Gretchen and Jim developed a self-concept that places them as part of a larger community rather than as lone individuals. Another part of both Gretchen and Jim’s self-concept was an identification with the “have-nots” as each were raised in loving but economically challenged circumstances. As a result, they both identify education as a means of “getting out” or advancing both their own and their families’ situations.

This chapter is set up as a conversation between Gretchen and Jim. Together, they explore each of these key themes and how they shaped their understanding of social justice and, ultimately, crafted their goals for the UCEA Center for Educational Leadership and Social Justice at Duquesne University.

Equity and Excellence

Jim: I had the good fortune to attend in 1987, as part of the Pennsylvania delegation, the National Youth At-Risk Conference in Arlington keynoted by then-Governor Bill Clinton. The speaker who made the most impact on me, though, was a 7th grader from Thomas Jefferson Junior High School who opened the first general session by asserting to that group of educational and policy "experts": "Ladies and Gentlemen, You are in trouble." He went on to explain: "How would you like to spend your retirement years in a country run by dropouts?" I think that question is very much aligned with Dr. Martin Luther King, Jr.'s famous quotation, "We may have all come on different ships, but we're in the same boat now." Without devolving into the political rhetoric of "No Child Left Behind," we do have choices about where we place our priorities, dollars, and focus as a nation and as states and communities. Actions (or inactions), though, have perilous consequences. If we continue exacerbating the differential opportunities available to poor kids versus kids from advantaged backgrounds, we will suffer that fate of which the 7th grader warned us over two decades ago. Even if some individuals and naysayers don't have a "heart for social justice," I hope we can convince them of the efficacy of socially just behavior to enhance their own self interest. As utilitarian as this may seem, self-centeredness may be the only way to motivate some people to egalitarian behavior. So be it! For, as we know from our social psychologist colleagues, if behaviors change, attitudes will follow.

Gretchen: For me, in one way or another, equity has always been about resources and opportunities. In elementary school, I recall being very aware of differences. Today, I am certain that this is because I was different—new to the school, African American, from a single parent home. I looked for and befriended everyone and anyone who I saw as being different like me. They were the kids that people bullied. They were the kids who were just a little shy or a bit awkward and uncomfortable with their smarts. As socialization and assimilation quickly teaches you, I learned that I needed to befriend the "cool kids," as well, those who made school life for us "different" kids miserable. I decided then and there that I had to be a bridge. I would learn to navigate both worlds. Reflecting upon that time in my life, I realize that I was destined to be the bridge. My ancestry and family history would culminate in a time and space that demanded that I step into that role and stretch myself in ways which demanded that in order to be successful, I would experience my schooling in ways that, by definition, gave meaning to the pragmatic political decisions about race and education that were made before my birth.

In his book *Silent Covenants* (2004), Derrick Bell writes,

> The world is moved by diverse powers and pressures creating cross currents that unpredictably, yet with eerie precision, determine the outcome of events. Often invisible in their influence, these forces shape our destinies, furthering or frustrating our ambitions and goals. The perfection for which we strive is elusive precisely because we are caught up in a myriad of manifestations of perfection itself. (p. x)

From my earliest memories, my family and community charged me with the responsibility of crossing cultural boundaries, of mastering the codes of power without severing ties to my Southern African American community. Examples around me, in the small rural African American community where I started school, believed that I (and all those whom they loved) had the ability to change the world. At least, that is how I felt. I grew up seeing people "do things." They organized meetings, ran churches, made a living on farmland they owned. Like most adults from a child's view, they were larger than life. Even though the older people in the community had minimal formal education, the ways in which they engaged the world made them appear to the smartest people I knew. They demonstrated love, kindness, and respect. Taught me right from wrong. My Grandfather affectionately known as "Poppa" and Grandma raised ten children of their own (helped with others). They sent them all to college, half of whom have advanced degrees. Their 18 grandchildren followed suit going to college and obtaining advanced degrees. It was all quite normal; nothing special, really. It was the expectation.

1971, the year of my birth, was the year that all the schools in the state of Virginia were finally integrated. Since poppa made mom the sacrificial lamb, one of four Black children who would integrate Stony Creek High School, it seemed only natural that once mom had completed college and could afford a home in the suburbs, she would move my brother and me to one of the best school districts in the state. We left our small, rural predominantly African American community school, where my second grade teacher had taught at least six of my aunts and uncles and attended our church on second Sunday's of every month, to go to a "better" school. In today's educational jargon, one would say that it, by definition, was a better educational choice because it had higher test scores.

That decision sealed my destiny. Equity and excellence seemingly meant access to resources and opportunities. In the 1970s and still today, this meant becoming fluent in the meaning-making structures of "White Culture" (Bower & Hunt, 1996; Clark & O'Donnell, 1999; Nakayama & Martin, 1999). I would be enrolled in a racially mixed school, take honors classes, become a class officer, and high school prom queen. I would learn (without the benefit of about what any of this meant) how to balance excellence on the terms of a White dominant culture all the while "being tethered to my grandmother's porch" (Hicks & Generett, 2010, p. 685). In many ways, I continue to grapple with the crosscurrents that Bell describes as determining the outcome of events. In reality, I learned little to nothing about equity and excellence in majority schools because they failed to critically engage me in an inquiring way about resources and opportunities. I was to be happy that *I* was in that school, that by their definition *I* was doing well. What I learned about equity and excellence, I learned by watching my mother's generation engage racism head on in their lives. My understanding of the collective ways in which historically oppressed groups persevere to obtain excellence was solidified by watching them remain engaged and hopeful in their quest for equity by taking actions each day to demonstrate their value and human self-worth in places where they were unwanted. As a result of such modeling, I learned that equity and excellence was never just about test scores and academic achievement. If it had been, the people who I held to be some of the smartest in the world by that definition would cease to be. Instead, equity and excellence came from knowledge that was rooted in lived experiences, not textbooks. I learned that equity and excellence would come only when knowledge rooted in experience was used to shape what we value and, as a consequence, "how we know what we know as well as how we use what we know" (hooks, 2010, p. 185).

Love: Operationalizing the Concept of Humanity Through a Servant's Heart

Jim: I will discuss the leader's authenticity later, but one aspect of that construct that I originally clumsily named "nonmanipulation of subordinates" in the original successful effort to develop and test a Leader Authenticity Scale (Henderson & Hoy, 1982) comes very close to describing a leader's obligation with regard to the concept of humanity. The leader authenticity aspect of "nonmanipulation" is based, to a large degree, on Tiryakian's (1968) classic work in which he distinguished between two levels of existence—the ontic and the ontological. Ontic referred to discrete things, to objects perceived by the senses and having recognizable physical properties. When used with regard to human beings, the ontic orientation referred to the objectification of self and others. The ontic mode of behavior, according to Tiryakian, was inauthentic. The ontological level referred not to a finite entity; rather, it was the essence, the source of identity, and the realness of an entity. To Tiryakian, the authentic person was one who behaved in such a way as to respect the ontological nature of others and himself or herself, indeed, the basis of ethical treatment of others.

Authentic behavior was the avoidance of manipulating other people as if they were inanimate or ontic beings. Inauthentic behavior was seen as the objectification of the self and others in interpersonal relations. The difference between the authentic and the inauthentic individual was the extent to which the person in question treated other persons as if they were inanimate beings. Likewise in another classic, Bennis (1989) depicts the fundamental differentiation between leadership and management: "the manager focuses on systems and structures; the leader focuses on people," and "the manager relies on control; the leader relies on trust" (p. 45). In fact, Burns' (1978) differentiation between the "transactional" leader and the "transformational" leader essentially distinguishes between those leaders who would undergird leader-follower relationships with the exchange of benefits or objects (transactional) and those leaders who would support the development of individuals within the organization, thereby supporting the growth—or transformation—of the organization.

Hence, it is imperative for all leaders—and especially those whose essential behaviors are circumscribed by notions of social justice—to treat their colleagues (see, I've grown beyond "subordinates") in a nonmanipulative fashion.

A Servant's Heart

My mom is my hero. She doesn't give voice to the term, "servant leaders." In fact, she probably doesn't even know the term; rather, she lives it. Given the unselfish way she always served others—without recognition and without reward—I always thought of my mom as having a servant's heart, but I never really thought about my mom as a servant-leader…until now.

In his 1970 essay, *The Servant as Leader*, Robert Greenleaf wrote:

> The servant-leader *is* servant first… It begins with the natural feeling that one wants to serve, to serve *first*. Then conscious choice brings one to aspire to lead. That person is sharply different from one who is *leader* first, perhaps because of the need to assuage an unusual power drive or to acquire material possessions…The leader-first and the servant-first are two extreme types. Between them there are shadings and blends that are part of the infinite variety of human nature.
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> The difference manifests itself in the care taken by the servant-first to make sure that other people's highest priority needs are being served. The best test, and difficult to administer, is: Do those served grow as persons? Do they, *while being served*, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? *And*, what is the effect on the least privileged in society? Will they benefit or at least not be further deprived?

I used to think that, while Greenleaf's essential focus on service was well-minded, he had the terms backwards. I used to think that leaders could also be service oriented, but leaders first. The older and more experienced I become, I am totally convicted that Greenleaf was absolutely correct all along. There has to be a primacy of servant spirit first if one is to be a servant-leader. Service cannot be an afterthought or a useful leadership trait appendage; otherwise it is not genuine. Moreover, Greenleaf's definitional focus of attending to the needs of "the least privileged in society" clearly creates the crosswalk to the notion of socially just leader. To me, social justice and servant leadership, though not a tautological relationship, are at least correlated at the .90 level in the jargon of some of my quantitatively oriented colleagues. For the years I have remaining, my essential mission in life is investing in my students' and my colleagues' future.

So, what about my mom? Well—to paraphrase Bill Clinton's handlers in 1992—it's the behavior, stupid! Whether it is watching an ailing neighbor's pet, making scones for her senior citizen apartment's bake sale, or chauffeuring a friend to the doctor (yes, she still drives at 89!), my mom is a servant and—in the eyes of her peers—a leader. Way to go, mom!

Gretchen: Somewhere in my informal learning at home and in community, I came to the understanding that the very people who cause you the most hurt and pain are the ones you have to learn to love. “Love them the most,” is a phrase somewhere in my consciousness, though honestly, I am not sure who put it there. There are days that I am distressed by how inhumane I observe educators interact with students. In the African American community, being treated inhumanely is a dark reality of our past. What is often not exposed and talked about in today’s mainstream educational discourse is how schooling continues to inflict such inhumanity in its structure and institutions.

I recall how thrilled and angry I was when I was finally assigned African American literature as a required text in a class. Yes, it was in college, but for the first time, I was provided evidence of what my home community had told me about by someone in a formal educational setting. It was at that point that I was able to articulate why the better school district, with the higher test scores had failed to connect equity and excellence. They had not engaged me at the level which I was human, at the level of my cultural self.

In a book chapter entitled, *What’s in a Myth: Qualitative Research as a Means of (Re)creating the World* (2003), I wrote about the popular myths of inadequate segregated school and inferior Black educators as a way of illustrating my own relationship to education and schooling more than 30 years after *Brown v. Board of Education.* As the myth goes, African Americans were segregated in dilapidated school buildings and without texts books. By definition, the inferior accommodations housed inferior educators and students. So goes the myth. Indeed, research provides a different narrative (Cecelski, 1994; Foster, 1996; Jeffries, 1997; Shujaa, 1994; Walker, 1996), one where African Americans created extraordinary learning contexts, where success was measured by college attendance and subsequent careers. Remember my grandparents? Ten kids, all college graduates, some with advanced degrees. They all attended segregated black schools with the exception of my mother. A merit scholar, Research I institutions, and Ivy League schools were the result of their schooling experiences in educational contexts created by people who loved them. I have come to learn that lots of good outcomes are possible when educators love their students and are able to connect to their humanity.

Consider the following quote taken from Historian Elizabeth Higginbotham, who writes about the experiences of the first generation of African American college graduates from majority institutions. She writes,

> Instructing children to survive in a racist society was a complex and cumbersome task with a long tradition in the Black community. As Black children learn at an early age that their group is devalued in the wider society, Black parents have to prepare their children both to recognize and to handle racist situations. Racism has the potential to limit life chances and choices in the lives and Black women and me; thus the expectations nurtured at home might reflect distant possibilities for individuals. Parents must be ready to provide support and encouragement to contradict the negative feedback their children will receive within schools and other mainstream institutions. Ideally, such encouragement and skills will enable Black children to become adults who have the capacity to love and work with others despite the crippling effects of racism. (Higginbotham, 2001, p. 65)

> Lack of an inclusive curriculum, disproportionate office referrals, and referrals for special education, an educational achievement gap that it is seemingly the norm, are commonplace daily assaults to the humanity of African American children. These assaults do not happen in the most distressed school districts. For African American students, they are just as likely to happen in what are considered the best districts as well. As a parent raising two African American children, I can attest to the thought and intentionality through which my husband and I navigate their educations. As a parent and educator, there are far too many days when there is very little love within the walls of schools today.
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> My propensity to want to see the good in people leads me to believe that it is not that the educators I see do not have the capacity to love other people's children. Perhaps, just perhaps, the vast majority of them have lost hope in the educational process. Indeed in order to be hopeful, one must have faith in their efforts to make a difference. This statement is more pronounced in places where there is little evidence of the impact of one's work. Drawing upon the knowledge of my lived experiences, including what I have learned from my family and community, I have come to the conclusion that "hope" and "action" have a symbiotic relationship (Generett & Hicks, 2004). In order to take or continue taking action, one must have a hope-filled frame of reference. The opposite is also true. In order to be hopeful, one must take action (Generett & Hicks, 2004). Educating in the service of others is a form of action, but working for social justice begs the question. What if our educators have bought into the myth that dilapidated buildings (think communities) equal inferior parents and children? What if educators have bought into the notion that those people are somehow, less human? How can they be hopeful? How can they take action? How limited is their capacity to love, to serve?

Taking the Risk to Forgive

Jim: People have hurt me, people I have trusted. Of course, I know that I have hurt others, in fact perhaps too many to recall. Love and forgiveness—especially as a leader concerned with issues of social justice—is the only way out of the inviting downward spiral of bitterness, revenge, and hatred because such leaders will absolutely suffer rebukes, affronts, and recrimination. As to perspective on being hurt or affronted, I especially resonate to an example from the Torah. You may know the background of the story especially if you've seen the Broadway show "Joseph and the Amazing Technicolor Dreamcoat." The youngest of 12 brothers, Joseph, received the jealousy of the remaining 11 and was ultimately duped, trapped, and sold into slavery in Egypt. Time passed and, because of his ability to discern dreams, Joseph became the Pharaoh's top assistant. When Joseph's brothers came to buy grain in Egypt because of the great famine, Joseph invited his family to remain and he finally revealed himself to them. All went well until Joseph's father passed away and his brothers assumed that Joseph would take his revenge. My favorite part of this story is described in the Book of Genesis (50:20). Speaking to his brothers about his having been sold into slavery and brought to Egypt, Joseph said: "You intended to harm me, but God intended it all for good. He brought me to this position so I could save the lives of many people." So it is with social justice leaders. We must assume that the end will be justified, even if the means are painful and disheartening. We are called to more than simply move ahead with optimism, though. Turning to the Bible's

New Testament, Jesus of Nazareth urges, “But I say, love your enemies! Pray for those who persecute you!” (Matthew 5:44). I have seen it dozens of times in my life as a leader and in others, when you love your enemies they will often (though not always!) become your allies in a just cause. It’s worth the risk.

Risk-taking—“It is from numberless diverse acts of courage and belief that human history is shaped. Each time a man stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope, and crossing each other from a million different centers of energy and daring those ripples build a current which can sweep down the mightiest walls of oppression and resistance” (inscribed on Robert F. Kennedy’s gravesite at Arlington National Cemetery).

> “A man who won’t die for something is not fit to live” (Martin Luther King, Jr.).
>
> “The greatest love you can show is to give your life for your friends” (Jesus of Nazareth (John 15:13)).
>
> I cannot improve on these words to live by, so I won’t even try.

Gretchen: If I am honest, I will admit that there are days when I am very angry. Writing this in and of itself is risky. People don’t like angry black women. But, it is true. Perhaps, if I am really, truly honest, I will admit that coupled with that anger is a visceral sense of disappointment. Martin Luther King, Jr.’s dream of this country’s potential has not been realized. As a representative of the positive outcomes of the Rosa Parks Generation, I am a representative of the work that remains.

Pragmatism put the African American community in a situation where the compromise to close our schools and leave our communities for a “better” life has proven less fruitful than imagined. In K-12 schools, African American students are falling further and further behind. Integration did not really transpire. For the most part, Black schools were closed, Black educators were fired, and Black students were sent into hostile environments. Today, our schools are just as segregated as they were in 1954. And, while I will never be as tired as by grandmother who cooked, cleaned, and washed clothes on a washboard for a family of 12 so that I could one day have a doctorate. I am mentally tired. Tired because I was raised to believe that the master’s tools were accessible to all. Not so.

Furthermore, I have learned that being the bridge is not enough. People whose knowledge and experiences are rooted in privilege, have to be willing to be bridges as well. The idea of privilege suggests that people benefit from and are thereby socialized into a worldview of power and influence without asking for those benefits. Senge et al. (2000) suggest that we all hold “mental models” (p. 67) that help us to frame and interpret knowledge. Therefore, it is essential for those who have access to the power that privilege affords to work to understand how power coupled with privilege operates. It is not enough for someone whose knowledge experience is not of privilege to state that inequities exist and that barriers continue to prevent equal opportunity. It is not enough for people from historical marginalized groups to sit at the table, share their stories, and be the bridge. It is not enough because, what invariably happens is that my family and my experiences are invisible to members of privileged groups. All they see is a tenured professor in the room. Rarely acknowledged are the barriers that were crossed by my family or myself to get into the room. Rarely do people acknowledge that I, or people like me, were once excluded from the room. The denial of this reality is painful to accept. This is why codirecting a center for social justice is important. It's about the relationships that one is able to create while doing the work to make ones context more socially just.

Reciprocal Relationships and Leadership Authenticity

Jim: The key to reciprocal relationships, I believe, is not to treat them as reciprocal relationships per se. Let me explain. Earlier I wrote of Burns' (1978) memorable distinction between "transactional" leadership and "transformational" leadership, in which transactional behavior essentially involves a quid pro quo exchange; I'll scratch your back, if you scratch mine. In fact, Blau (1964) and others later have referred to this effect as the "norm of reciprocity."

I would assert that genuine reciprocal relationships are established and nurtured because those invested in the relationships are *not* concerned about "what's in it for me" (using others as things in an ontic way); rather, the participants in the relationships are seeking to selflessly benefit their partners (in a transformational or ontological fashion) irrespective—and sometimes contrary—to the good that they will receive. The correlation with servant leadership here is apparent as is the reality that social justice leaders may not always be appreciated, or even tolerated, by those whom they would choose to establish a relationship and serve. But they move forward with the relationship anyway. They are willing to discern, and risk in, the potential of others. After all, that's what leaders do.

The original leader authenticity scale (Henderson & Hoy, 1982) and its subsequent derivatives (Henderson, 1998; Henderson & Brookhart, 1996) have proven to be of substantial heuristic value and have produced certain interesting and illuminating findings. Links have been tested and found between leader authenticity and trust; organizational climate; humanism in pupil-control orientation; teacher job satisfaction; accountability; faculty efficacy, teaching efficacy, and total efficacy; collegial faculty-faculty relations; faculty authenticity; faculty empowerment; organizational effectiveness; leader effectiveness; and more.

The school leader's selflessly working to perform in the best interest of others—internal or external organizational "clients" such as teachers, students, and parents—is a respectful act. This is directly analogous to the leader authenticity aspect of nonmanipulation. The school leader's possessing courage and a strength of character is another ethical imperative. To accept responsibility for actions and mistakes and to move to correct those difficulties is a sine qua non of effective schools. This attribute directly relates to the leader authenticity aspect of accountability. Finally, the ethical and socially just school leader exhibits the actions of servant leadership and is clearly honest—both to herself or himself and also to the school's stakeholders. The ethical and socially just school leader is not a puppet, but is, rather, a real person possessing a moral compass for the leader's expressions and actions. This leader is not just a role incumbent per the leaders authenticity aspect of salience of self over role—this leader is a real person.

If we believe the empirical evidence presented in numerous leader authenticity studies (Henderson, 1998), in what will authentic and socially just behavior of the part of school administrators and teachers result? We will have schools in which interpersonal trust and respect, ethical and socially just behavior, and positive morale and job satisfaction predominate. Moreover—and of great importance to those who would call for increased school productivity and enhanced standards—authentic behavior also results in schools in which accountability, teacher self-efficacy, effective teacher supervision, and leader effectiveness are evident. These ethically based and socially just schools are places where students have a chance to model behavior on the part of teachers and principals that is accepting of responsibility, that exhibits a sincere concern for all of the stakeholders in the school, and that demonstrates that the teachers and principals are real human beings who treat others according to their needs and not according to monolithic rules. These are schools where young people are encouraged to succeed academically and interpersonally. These are schools that work.

Gretchen: Relationships are where I have learned to trust that people have the capacity to change the world. I know this because in relationship with others is where I work to create my own ethic of risk. Doing so is a continuous process, not unlike the process of becoming a leader. In actuality, at this point in my life, I believe that creating an ethic of risk and leadership are toggled together by the one's enactment of social justice. Let me explain. In relationships with people (as opposed to being the bridge), I have refined the exceptional lessons taught to me by my family. First, I have redefined my understanding of responsible action. Growing up, responsible actions entailed being better than the majority because that is what it took in order to have access to resources and opportunities. Striving for excellence served me well, but excellence without responsible action did not nourish my soul. In her text, *A Feminist Ethic of Risk*, Sharon Welch redefines responsible action as "the creation of the conditions of possibility for desired changes" (p. 46). Responsible action as one works on the behalf of others suggests that context *really* matters. Over the years, I learned to pay very close attention to context if I am to carry out responsible actions that include all stakeholders. I cannot be inclusive without cultivating relationships.

I have always been grounded in my community, another important concept in creating an ethic risk (Welch, 2000). The relationships that I have cultivated over the years include a much larger, more extensive community. Working for social justice demands that I integrate my past, present, and (hopefully future) narratives along with my understandings of community in order to lead for social justice and to learn from the interactions I have with others.

Finally, witnessing others as they work to be authentic leaders for social justice has taught to me to be a strategic risk-taker. Welch defines strategic risk-taking as "not the willingness of someone to risk their life, but the contribution that such an action will make in the imagination and courage of the resisting community" (p. 47).

My early lessons of equity and excellence did provide me with access to resources and opportunities. My access to privilege has surely increased. As I work in urban schools and listen to young people describe the lack of hope they have in adults to do the things they feel will make a difference in their schooling experiences, I am reminded of my colleagues near and far who sustain my hope by their acts of resistance and strategic risk-taking. There are days, and I have written about this in other works, where my relationships with these courageous individuals sustain me.

Questioning

Jim: A great example of questioning the status quo is found in Robert F. Kennedy paraphrasing George Bernard Shaw: "There are those that look at things the way they are, and ask *why*? I dream of things that never were, and ask *why not*?" Of course, my favorite example of questioning is Dr. King's juxtaposing the picture of America as a racist and racially divided nation with his picture, his vision, his dream of an integrated and unified America in what came to be known as his 1963 "I Have a Dream" speech. Leon Festinger (1964) was right too—cognitive dissonance is a powerful force. Cognitive dissonance essentially involves a discomfort caused by holding conflicting cognitions simultaneously. Dr. King masterfully painted a picture of what America was and yet could be. The result is a painful, but important history. More recently, Christensen, Johnson, and Horn's (2011) notion of disruptive innovation involves a process that simplifies products or services that were historically expensive, complicated, hard to use, very centralized, and it transforms them into ones that are far more accessible, simple to use, affordable, far more customizable. Both concepts rely on the observer's being able to not only notice but viscerally feel the difference between states of being and—here's the key—to be motivated to change behavior. The process starts with questioning, though. In the region of Pennsylvania in which I live, if one were to first visit an elementary classroom in the Clairton School District, then one in the Upper St. Clair Schools (where my home is), one should be prompted to ask, "Why do the predominantly Black kids in Clairton not have access to the same kinds of spaces, equipment, supplies, materials, and resources that the predominantly White kids in Upper St. Clair?" Simple question. This, though, should then prompt equity-audit-type questions about inequitable school funding, racist public policy, and the corporate will necessary to educate all children, among others. An anonymous pundit once asserted, "The best way to get an answer is ask a question." I believe that contention with all of my heart and it is especially important when children's futures are on the line.

Gretchen: In a recent leadership class, I encouraged them to use their imaginations in order to take more risk. Actually, I encouraged them to dream big, to consider what they would do if the current barriers that impede them were removed. They shared some extraordinary ideas about assisting families and communities, about righting education. They described a world where social justice was commonplace and everyday language. My question for them, "What's stopping us?"

Maxine Greene (1995) reminds us of the importance of the capacity to imagine our world as we think it should be. She writes,

> Imagination, as is well known, is the capacity that enables us to move through the barriers of the taken-for-granted and summon up alternative possibilities for living, for being in the world. It permits us to set aside (at least for a while) the stiflingly familiar and the banal. It opens us to visions of the possible rather than the predictable; it permits us, if we choose to give our imaginations free play, to look at things as if they could be otherwise. (Greene, p. 494)

Asking myself what I would do if I could to create more socially just contexts encourages me to think big. It forces me to reflect upon my own narrative and to imagine the possibilities when people believe that you are the very thing that will be the difference.

Frameworks Summary

Jim: The last graduation over which I presided as Dean of the Duquesne University School of Education in 2003 was bittersweet for me. Our School's students and graduates were doing incredible things, and the School was very healthy with respect to enrollment, faculty, and staff complement, and program growth. What was disquieting for me, though, was that I was going through some professional and personal challenges that would result in my resigning the Dean's position and returning to my role as professor. So it was in that context that I wrote my last graduation speech to attempt to teach our soon-to-be graduates:

> For you graduates and your family and friends I expect that you will celebrate this evening and the rest of the weekend … and you should. This is a great life occasion and the perfect stuff of celebration. But what is better than celebration? What can I wish for you?
>
> I pray that you will celebrate today and have a profound sense of peace tomorrow, and the next day, and the next!
>
> And what is one person's recipe for peace? This is by no means an exhaustive treatise on the subject (we haven't the time and you do want to celebrate this evening, don't you?), but I do want to summarize some of the research lessons and—more importantly—life lessons that I've experienced. So, how do you experience that elusive quality, peace?
>
> - First, Forgiveness. People will hurt you. Your coworkers and friends will hurt you. Your students will hurt you. That's the nature of people and it's also our nature to want to extract revenge. *Don't*. Resentment can eat you alive. Forgive instead. It's as close as we come to Godly behavior.
> - Next, Service. Whether it's part of your job or—better—if it's not, spend your life serving the needs of others. You'll figure it out—there are needs everywhere. Keep your eyes open and keep your heart open.
> - Then, Selflessness. This is very close to service, but I think it's different. Recognize the will of God for your life by giving yourself up to something or some cause greater than yourself. After all, you're graduating from a school that fundamentally is about the activity of teaching, a Godly calling indeed.
> - And, Patience. Don't try to save the world on a global scale, but try to save your little piece of the world through one action of kindness at a time to one student at a time. In that way, you have the opportunity—every day—to change one world.

- Of course, Love. But when I talk about love, it's not just loving those students or clients who respond to your efforts, who are, by definition, loveable—it's especially focused on loving those who are seemingly unlovable … or incapable … or unreachable. You may be their only hope. Be different—love them all.
- Finally, Faith. The author of the book of Hebrews indicates that, "Faith is the assurance of things hoped for, the conviction of things not seen." You can't assure that your students' lives will turn out well any more than you can assure that the lessons you teach will have an impact.

> You know that some of the lessons you intend to teach will be rejected or—even worse—ignored. You *will* make a positive difference, though. Have faith!

When I had the opportunity to work with my friends and colleagues to propose then create the UCEA Center for Educational Leadership and Social Justice, I tried to incorporate the lessons and the imperatives outlined in that last graduation speech into what I thought we should be doing in our center. Of course, I have been richly blessed by my association with Gretchen Generett to guide my thinking. That led, of course, the creation of a vision and an agenda for the Center.

Creating an Agenda for the Center

We have been working over the past 2 years—first with our staff, student, and faculty colleagues at Duquesne and also with our network of critical friends (Jeffrey Brooks, Gary Crow, Michael Dantley, Fenwick English, Mark Gooden, Margaret Grogan, Leslie Hazle Bussey, Gaetane Jean-Marie, Lauri Johnson, Reva Joshee, Gerardo Lopez, Peter Miller, Diana Pounder, and Michelle Young)—to craft the direction and agenda for the center. Certainly, anything can be amended, but we are pleased with the articulation of our vision, mission, beliefs, and our action imperatives.

Vision

The UCEA Center for Educational Leadership and Social Justice aspires to be a community that is dedicated to identifying and eradicating conditions of social injustice in our schools and communities through enlightened and actionable scholarship, preparation and development of socially just educational leaders, and the encouragement of leader-practitioners in service of all students. We envision a future in which all young people will be accorded respect and will achieve success in schools and in their communities.

Mission

The mission of the UCEA Center for Educational Leadership and Social Justice is to advance equity and excellence on behalf of young people, especially those who have been marginalized, mistreated, and neglected. This mission will be accomplished by educators, community members, and academics working together to study, implement, and continually assess educational systems, procedures, and activities through the lens of socially just and educationally sound practices.

Beliefs

We believe that socially just leadership is the fusion of the mind, heart, and spirit in the moment of action.

We believe that leaders impact the conditions of social justice and that the conditions of social justice impact the formation of the leader.

We believe that educational research only has meaning when put into action to positively affect the lives of kids.

We believe that educational leaders, when confronted with conditions of social injustice, must have the courage to risk personal comfort and safety to improve the lives of students.

We believe that socially just leaders systematically and intentionally interrogate themselves to continuously improve and understand personal biases, assumptions, and prejudices.

Action Imperatives

We must identify and develop educational and community leaders who are committed to, and effective in, eradicating conditions of social injustice that are experienced by any of our society's young people.

We must pursue and promulgate research dedicated to testing and identifying best educational practices that will enable all young people to learn as much and as well as possible.

We must establish and maintain a dialogue among educational practitioners, community leaders, and university scholars regarding advancing equity and excellence in our schools and communities for all young people.

We must advocate for policy reform to ameliorate socially unjust systems and processes in our communities, states, and nation.

The UCEA Center for Educational Leadership and Social Justice in the Duquesne University School of Education has the potential to impact the intellectual conversations about social justice and social inequities, but more importantly, it is poised to impact actions taken to alleviate social injustices. The center is a resource to academics, practitioners, students, and community members interested in the intersections of and relationship between educational leadership and social justice. Through a diverse range of platforms, the center will disseminate information on social justice issues as they impact students at all levels. The center strives to be a place where individuals and groups working to address issues of social injustice are able to integrate theories and actions that address the identified problems. We believe that educators from different orientations within the field need to create a common language and have a more uniform understanding of social justice and its role in education. Ultimately, educators in the academy and in the field need to have models/examples of (1) how to integrate social justice frameworks into their practice and (2) how to create supportive networks whose purpose is to critically question the discussions and impacts of the intended work.

One example of how we are working to create a framework for our learning as individuals whose work is housed within a center is through a partnership vehicle called *School-Academy-Community (SAC) Partnerships*. SAC partnerships seek to bring together stakeholders from schools, from local universities, and the broader community including nonprofits, business, organizations, and individuals who hold an interest in improving schools, to work in a process that allows for equitable engagement on critical issues in education. Ultimately, we believe this framework will allow us to identify and better understand obstacles that prevent more equitable schooling in any and all contexts, to design and develop ways of overcoming barriers through collaborative means that bring diverse opinions and input at each stage of our learning.

As we work to engage colleagues across differences, we are mindful of the barriers that confront us. And, while we want to be a resource to educators interested in integrating social justice practices into their work in critical and engaging ways, we are mindful that we, as committed as we may be, have a lot to learn as well. Thus, partnerships that bring together like-minded people from a vast array of backgrounds and communities, including international perspectives, are essential to *our* learning and ability to serve as a resource to all educators. We recognize that the conversation between Jim and Gretchen, while modeling dialogical engagement across differences, is limited in that it highlights differences within an American context. SAC Partnerships provide a frame whereby those truly interested in issues of social justice can engage in dialogical encounters that help to identify and address educational problems in any context. In our minds, the possibilities for learning and creating better, more equitable educational outcomes for all are limitless.

Conclusion

By sharing their experiences, Gretchen and Jim have found that, though their journeys may have been very different, they have arrived at a common ground. We believe that this common ground can be found among all educators in any context. Gretchen, a young Black woman from the South, trained as an academic, and touched and transcending the institutional racism in which she found herself in various venues of her life, has chosen to follow her role models in the quest for equity and justice for all children. Jim is an older White man from the rust belt, trained as an educational administrator, who experienced a growing awareness of both the societal inequities imbedded in education and of the need to ameliorate those curses, has given his life to both leading schools to change and teaching others how to do so. Individually, each is a model of what the center aspires to develop in other leaders. Together, they share, in the words of Duquesne University's mission, the "mind, heart and spirit" to accomplish the vision of the UCEA Center for Educational Leadership and Social Justice.

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Part VIII
Afterword

Chapter 62
The Way Forward

Carolyn M. Shields and Ira Bogotch

We conclude this international handbook on educational leadership and social (in) justice with just three words, *the way forward*, knowing full well that the real work doesn't end with this publication. It cannot. It must not. So let us be clear upfront: the use of the phrase "social justice" does not make it a reality. We believe sincerely that we are leaving you in a much stronger political and intellectual position than when you first began selectively looking at individual chapters in this *handbook*. The 100 or so authors have challenged us to think and act and stay committed to social justice as an educational construct in whatever community, state, or nation we live.

We have read how various authors conceptualize social (in)justice in their contexts and seen how social injustice plays out in these different contexts in various ways. We have reflected on how to study social justice and how to prepare leaders for social justice. We have considered some of the challenges presented to educators who lead for social justice. We have seen evidence of educational leaders *making a difference* where they are. And throughout all of the chapters, and particularly in the sections related to advocacy, activism, and intervention, we have heard calls to action.

We have also seen that social justice is relevant to all regardless of the state of a nation. The distinction between developed nations and undeveloped nations need not be a barrier to social justice; indeed, it is in difficult circumstances where social justice is needed most. Many of the chapters originate in nations in conflict, where human rights, social cohesion, and democracy have not taken root.

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The purpose of the *handbook* was not to promote social justice talk, but rather to demonstrate the critical need for a bold new approach to educational leadership—an approach that has the potential to make a difference to the peace, prosperity, and welfare of our global community. It is not possible, as early scholars of educational leadership in North America argued, to exercise leadership that is objective and devoid of values, subjectivity, or moral purpose. It is not sufficient to operate educational institutions that promote the achievement of those who already hold status, power, and influence in society. It is not sufficient for those who hold power to argue that others have similar opportunities to succeed if only they work hard enough. Educational leaders must strive to create institutions of excellence that level the playing fields, that "float all boats," and that transform the circumstances of the least advantaged in every milieu. We must remove the barriers to participation, inclusion, and achievement to ensure every student in every classroom—child, youth, or adult—has the opportunity to succeed. And we must ensure that educational success is only the beginning, a means to the goal of what Judith Green (1999) describes as "the experience-based possibility of more equal, respectful, and mutually beneficial ways of community life" (p. vi).

Thus, one of the major lessons from these chapters collectively is that leading for social justice differs from place to place in emphasis, action, and practice. Nevertheless, it is embedded in several attitudes, concepts, and principles that we believe hold true across contexts and sociopolitical and cultural milieus. The idea of the inseparability of space-time as a continuum is what Bakhtin (1981) called *biographical time*. Bakhtin identified three different ways of living in space and time. He believed that too many of us live much like comic book heroes, in what he called "adventure time"—believing that events are controlled only by chance and that it is futile to try to change them; or in a combination of "adventure time mixed with everyday life" in which we move from crisis to crisis, never being able to predict or control circumstances or exercise advocacy, action, or agency. Bakhtin argues the importance of living life in *biographical time*, living in the public square, fully aware of the complexity of every situation and, perhaps most importantly, of our personal agency. In biographical time, we cannot understand the present without knowing the history of a particular place or people, not believing that history determines the present, but in understanding the complex and dynamic interplay of often contradictory forces. This interplay is what we have highlighted in this handbook—an array of social conditions, geographic places, and educational beliefs, strategies, and interventions.

We have not tried to be representative of all continents, countries, or regions; nor have we tried to represent every ethnic, religious, or linguistic tradition. Instead, we have tried to give voice to various perspectives, without making them token representatives of any given category. We have tried to show the rich and diverse ways of thinking about, leading for, and doing social justice, without any claim to be globally comprehensive. Thus, although we have given voice to diversity and difference, the perspectives still unheard are boundless.

Multiple authors have emphasized that we carry within us an embodied history and a complex mixture of injustice and justice. Some are most familiar with oppression and marginalization; others are cognizant of privilege, domination, and power (often but not exclusively associated with whiteness). Regardless of where we are located, we are works in progress, striving to move beyond understanding or Fraser's (1997) concept of recognition to advocacy, activism, or action. In other words, we are suggesting that, taken together, the chapters in this *handbook* comprise a call to radical action that we believe is at the very heart of excellent educational leadership. Some might call it a call to critical educational leadership in that we are arguing for overcoming forces that have excluded, marginalized, and oppressed the least advantaged and least powerful members of every society. We are well aware that we have all prepared our chapters within a global context of fiscal and political challenge, in an era of increasing neoliberalism with its emphasis on international comparisons, benchmarks, and performance assessments; on accountability and performativity; and on market competitiveness. Unless we are careful, all of these forces can serve to increase social injustice on a global scale rather than to promote social justice. In fact, many policies distract us from the goal of educational leadership for social justice. A focus on test scores, for example, while serving to present a more successful front to the community and general public may simply mask the numbers of students who have been "pushed out," retained in a lower grade, misplaced or misdiagnosed as needing special education provisions, and so forth. It may also mask the bias of the test, that is, its inappropriate use as a measure of student learning, or a narrowing of the curriculum that equates education with test passing instead of learning.

Hence, we believe the call is to go beyond reforming and improving or "helping," to go beyond "ensuring equity of access," or ensuring that all students are well prepared for higher education (as important as these may be). Excellence in educational leadership cannot be achieved by following a prescriptive set of policies, by ensuring adherence to formal policy, or by guaranteeing that the organization runs smoothly.

Instead, our call is for educational leaders not to be diverted from the fundamental goal of promoting social justice wherever and whenever possible, inside and outside their institutions. Oakes and Rogers (2006) offer considerable insight here in that they argue persuasively that the reason there has been so little real change towards equity or social justice despite all of the cycles of educational reform most educators have experienced is that few reforms have taken the end of social justice as an explicit goal. They argue that "merely documenting inequality will not, in and of itself, lead to more adequate and equitable schooling" (p. 13). In fact, they assert that "the vast change literature says little about strategies for disrupting social inequality through school reform" (p. 30) and that their research has taught them "that technical knowledge is insufficient to bring about equitable education, even when attention is paid to changing the school's professional culture" (p. 31). Ultimately Oakes and Rogers state that "equity reforms must engage issues of power by extending beyond the school" (p. 31). To that end, we have tried, in these chapters, to go beyond documenting inequity within school contexts to focus on a broader range of social injustices and to provide rich discussions of implications for educational leaders and suggestions for moving forward.

The word “spaces” is often repeated in these chapters as we rethink how we make sense of our lives and our work. Various spaces lead us to know the differences between socially just educational activities, such as good teaching and moral leadership practices in schools and universities (Bogotch, Chap. 4 in this volume), and social justice within and beyond the wall of educational institutions (Shields, Chap. 19 in this volume). As a profession, educational leaders will need to commit to more socially just and equitable educational practices and policies in order to promote high levels of intellectual development and academic achievement as well as to develop active and engaged citizens. We must ensure that our policies and practices are educative—developing understandings that help us to take our place among those who strive to transform our communities and societies. And we must do no less for those with whom we work and for those whom we teach. Educational leadership must, as Foster (1986) argued a quarter of a century ago, “be critically educative; it can not only look at the conditions in which we live, but it must also decide how to change them” (p. 185). Burns (1978), whose book *Leadership* has been seminal, called for leadership to have a transforming role and argued that, in order for this to happen, the leader “cannot stand outside society” (p. 142) but must be a “response to society.”

Unless we are able to make social justice fundamental to education and educational leadership, unless we are able to recognize injustice and work to overcome it, then as educators we fail to fulfill our civic role in societies around the world; indeed, we are complicit in perpetuating injustice. Leadership for social justice is more than a set of socially just educational practices which are necessary but not sufficient to effect social transformation. In fact, we believe with Burns (1978) that nothing short of a revolution in education is demanded to address the multiple injustices of the twenty-first century. Burns wrote:

> Revolution is a complete and pervasive transformation of an entire social system. It means the birth of a radical new ideology; the rise of a movement bent on transforming society on the basis of that ideology; … reconstruction of the economy, education, communications, law, medicine, and the confirmation and perhaps deification of a new leadership. (p. 202)

It is to this new ideology of educational leadership that we are called through the chapters in this *handbook*.

Looking Backwards

The titles to the subsections were chosen deliberately; we asked authors to interrogate their theorizing, researching, policymaking, programming, and leadership preparation as if every activity was an intervention, grounded in advocacy and activism and leading to a more socially just education in a more socially just world. Here, our goal is not to reiterate or summarize what you have read, for to attempt to do so reduces the rich variety of multiple perspectives to meaningless platitudes. It is certainly not to suggest that leadership for social justice must follow a particular path or a series of prescriptive actions that may be checked off on a “to do” list.

Instead, it is to encourage you to take time to reflect on what you have read and to carefully consider which ideas have spoken to you most, where you are, and, thus, can inspire you to action.

Thus, the way forward must begin by looking back—back at the situations, ideas, and suggestions of these authors, back beyond the chapters to the historical realities of injustice, suffering, and struggle represented in these pages and by many other stories and situations you do find in these pages. The way forward begins with each of us, where we are, knowing ourselves, and interrogating our history, our assumptions, and our positioning. Those of us who are privileged must acknowledge that privilege and the complicity in injustice that may have fashioned us. It requires us to question ourselves and our motives, but never to assume that we can know others' situations or speak *for* them. Too often those in positions of power or privilege sound defensive, claiming they cannot be held responsible for the "sins of their fathers," but at the same time failing to recognize how they benefit from the past. Too often, those in positions of power or privilege argue that it is time to put the past behind us, to simply get on with the task of living in the present and planning for the future.

What we fail to understand is how we carry within us, within our embodied presence, the nails, the insults, and the injustices of the past. We cannot expect those who have been victimized by policies aimed at destroying their beliefs, language, or culture to simply move forward, unless we acknowledge the harm done in the past. We cannot expect those who have been wrenched from their families through policies aimed at "civilizing" indigenous populations through residential school programs in many countries to move forward without acknowledging the disruption to family and community. We cannot expect those whose families were dispossessed of most of their material goods and interned in countries where they had become citizens not to be resentful at having to start again. We cannot expect those whose family history is inextricably bound up with slavery to easily accept the indignities of being considered and treated as chattel. Individual, personal insults are difficult to let go of, unless a sincere apology is tendered. How much more necessary is it for a society to acknowledge the wrongs that have been perpetrated on some of its own, to apologize, to make reparations where possible, and to stand *with* those who have been wronged as they move forward? To do anything less is to silently assent to past inequities, making ourselves once again complicit, and perpetuating the injustice in a new, and perhaps more egregious fashion.

The way forward must go beyond intellectualizing inside the academy of scholarship as well as beyond the meanings of good intentions, of "best practices," and "hard work." What that means for us is that the way forward cannot ignore material differences that are based on disparities, inequities, and injustices in our everyday practices as researchers, professors, teachers, or school leaders. And it also means we must make the tough decisions to confront past injustices and to raise them, acknowledge them, discuss them, and apologize for them. Requiring uniforms in schools and providing free lunches may be moral and ethical and right, but until we connect why we provide goods and services to the more challenging conversations about how we can reduce inequities in homes, in healthcare, and in family literacy projects, then our priorities and good works will not change the world and the lives of children. And what we all want to do is to *make a difference*.

For this reason, the handbook offers questions about the role of educational leaders in addressing homelessness (e.g., Miller; Warke) and in educating children with special needs (e.g., Damaj; Oweini & El Zein) and about the state's responsibility to fund free education for all (e.g., Mestry). Many authors have offered salient critiques of current dominant conceptions of social justice and of current practices (e.g., Grant; Mansfield; Johnson & Dempster) and challenges to current methodology (e.g., Larson; Lyman, Lazaridou & Strachan) and to leadership practices (e.g., Orzel; Ryan; Gonsalvez). In every case, we have invited you to reflect on the relevance of the question, or critique, or challenge to you in your context and to determine what insights the chapter offers you to help you move forward.

Looking Ahead

We now want to make your drive/ride/walk/commute to the work of social justice leadership hard. The next steps ought not be taken lightly because hard cannot just mean being busy or consumed by activities or "to do" work lists. What we mean by hard is that leadership is difficult; it requires us to recognize the larger moral challenges we face as educators that require us to take courageous stands; to contribute to solutions to eradicate such injustices as illiteracy, poverty, and joblessness; and to challenge both the *status quo* and those who benefit from it (often those in power). It requires us to take risks, to accept angry responses from those who feel threatened, to lose sleep, to agonize over how to align oneself with the oppressed without being hegemonic or patronizing, and to be willing to persist over time and obstacles. It requires recognizing that leadership for social justice is organizational and managerial and financial work, but it is also political and cultural work. It requires standing with those who have little influence or formal power but who need our support.

The way forward will be difficult because there can be no road map and no prescription and because it will be different in each place and for every leader; it will be different because each context, each history, and each lived experience is different. We cannot assume we know people, their challenges, or some possible solutions even if we believe we have shared a similar situation. Data do not and cannot tell the whole story. Hence, leadership for social justice demands more than data analysis, more than strategic planning, and more than efficient expenditures. Addressing social injustice, including societal, health, or educational gaps, must be linked to making political and ethical changes in how we work and live—beginning today.

The way forward is rooted in historic realities—the material, sociocultural, and political advantages and disadvantages that have always existed in our societies. In the USA, at the top of the economic ladder, some parents register their unborn children on waiting lists for the most prestigious private preschools that charge high tuition fees while others can only hope that their local school provides a sound education. But what if all children had access to high-quality preschool education that did not require waiting lists or fees? What if educators really believed that all children had the potential to graduate from college or university and to take up a productive and caring place in society? What if, instead of building expensive prisons, we used the funds to support the higher education of those who cannot afford it on their own? What if, instead of arguing over whether governments or individuals are responsible for child care, welfare services, or healthcare, we simply ensured that every citizen in every society had his or her basic needs met? What if we could put an end to the ceaseless competition for resources and put our efforts into creating systems that were excellent, more equitable, and socially just?

Too often educational benefits are described in individualistic and competitive terms. A higher education permits one to attain a better paying job, to advance one's career aspirations, and so on. But it is also abundantly clear that education promotes the welfare of civil society. However, this does not occur automatically or by a process of osmosis. Benjamin Barber (2001) asserted that

> the literacy required to live in civil society, the competence to participate in democratic communities, the ability to think critically and act deliberately in a pluralistic world, the empathy that permits us to hear and thus accommodate others, all involve skills that must be acquired. Excellence is the product of teaching and is liberty's measure. (p. 12)

These are the tasks of the educational leader focused on social justice education as a basis for civic competence and intellectual achievement. For educational leaders, the way forward, as Barber advocates, involves listening, learning to hear and accommodate others.

Hence the way forward is rooted in dialogue—not as endless talk that entrenches perspectives and positions, but as dialogue that permits suspension of oneself, one's beliefs, and one's positions and that leads to understanding of "the other." This does not require reaching agreement and, indeed, most often cannot. When we seek the middle ground, the points on which we can agree, we are often avoiding the central issue of inequity or social justice. At other times, reaching agreement necessitates agreeing on a large principle, but avoiding the ways in which it plays out unfairly in practice. For Bahktin, dialogue is not just talk but a way of life. It does not imply endless discussion until one party gives in, but endless listening to promote understanding. Dialogue, as Bakhtin develops the concept, is foundational to life itself. He writes:

> everything … gravitates toward the dialog, toward dialogical opposition, as the center point. Everything else is the means, the dialogue is the end. One voice alone concludes nothing and decides nothing. Two voices is the minimum for life, the minimum for existence. (1973, p. 213)

In other words, educational leadership for social justice requires an ontological approach rather than an instrumental approach to dialogue. The dialogue, through which we develop new understandings and new relationships, is an end in itself, not a means to achieving an organizational goal, attaining consensus about a policy or practice, or moving forward to develop a new program. Even trying to find a win-win solution implies that the playing field is level at the outset; otherwise, a win-win solution most frequently serves to benefit the party who held the advantage or privilege to begin with.

The way forward requires educational practice grounded in relationships, relationships of respect and what Starratt (2011) called "absolute regard." Educational leaders must acknowledge, as we have said before, that we cannot understand all history and experience all inequity; we can never have all the answers. In fact, we must stand with others and work alongside those whose experiences, beliefs, and even values may be different from our own, cognizant that anything else may comprise misplaced or even hegemonic and patronizing efforts that fail to enhance equity and social justice.

The way forward is grounded in action. There is little doubt that "merely documenting inequality will not, in and of itself, lead to more adequate and equitable schooling" (Oakes & Rogers, 2006, p. 13). Moreover, it will never lead to a more equitable and socially just society. Action, indeed, collective action, is required. And educational leaders for social justice must play a central role both in constructing the public awareness required and in leading the action that will permit transformation to occur.

It is to these ends that this handbook is dedicated—as we, the editors, join with the 100 other authors in this collective search for global approaches to education that promote the collective good of all.

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