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THE POVERTY OF EDUCATION

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Abstract

The poor performance of learners in the Annual National Assessments (ANA, 2010) alongside consistently weak performance in international tests such as TIMMS, PIRLS and SAQMEQ, and locally at the Matric level, has highlighted deep-rooted weaknesses in the South African education system. Notably, as has been known for some time, the burden of failure falls primarily on rural and African children and the consequent drop-out of learners has a knock-on effect to the labour market where again the burdens of unemployment fall most heavily on these youth. The state is fully aware of these effects and has responded with a plethora of national intervention plans to try and turn this situation around. Most notable of these, apart from the curriculum reform (CAPS), are the proposed “Integrated Strategic Planning Framework for Teacher Education and Development in South Africa 2011-2025” and the “Action Plan to 2014: towards the Realisation of Schooling 2025” (DBE, 2010). These are backed and under-pinned by a commitment to increased learner testing, not only to provide benchmarks of progress, but significantly to create a basis for consequential accountability in the system. This paper in an examination of both of these aspects, the weaknesses in the education system and the proposals to address these, will argue that the selection of indicators to peg performance will likely firstly, define the purposes of education in ways that may be antithetical to broader societal purposes of education, and secondly, drive the system in directions that may exacerbate the problems identified in the first instance. Consequently, while acknowledging the place of performance evaluation, a case will be made for the use of complementary measures as yardsticks of progression and as levers for intervention.

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1. Introduction

The poor performance of learners in the Annual National Assessments (ANA, 2010) alongside consistently weak performance in international tests such as TIMMS, PIRLS and SAQMEQ, and locally at the Matric level, has highlighted deep-rooted weaknesses in the South African education system. Notably, as has been known for some time, the burden of failure falls primarily on the poor, especially those in rural areas. Being poor frequently leads to learners dropping out of school and so severely diminishing their chances of finding employment. The state is fully aware of these effects and has responded with a plethora of national intervention plans to try and turn this situation around. Most notable of these, apart from the curriculum reform (CAPS), are the proposed “Integrated Strategic Planning Framework for Teacher Education and Development in South Africa 2011-2025” and the “Action Plan to 2014: towards the Realisation of Schooling 2025” (DBE, 2010). These are backed and under-pinned by a commitment to increased learner testing, not only to provide benchmarks of progress, but significantly to create a basis for consequential accountability in the system. The question that arises is that of the appropriateness of bench-marked tests as a response to poverty. This paper makes reference to the CAPS, the Integrated Planning Framework and the Action Plan but focuses on the emphasis that has developed within the system on the regime of testing and benchmarking as approaches to monitor and hold to account the stakeholders within the system. The paper will argue that the selection of indicators to peg performance will likely firstly, define the purposes of education in ways that may be antithetical to broader societal purposes of education, and secondly, drive the system in directions that may exacerbate the problems identified in the first instance, and particularly those relating to the ways in which poverty comes to influence the experience of schooling and education more broadly. Consequently, while acknowledging the place of performance evaluation, a case will be made for the use of complementary measures as yardsticks of progression and as levers for intervention.

2. The Meaning of Quality and the Use of Indicators

The discussion of poverty and education is framed by a few key points. The first is that there is a direct relationship between poverty and the experience of education. Learners from poor households perform on average less well in tests. In general they take much less away from the educational experience than their better-off counterparts. The second, a corollary of the first is that increased levels of education will raise their chances of finding employment and of lifting the standard of life to which they have access. Becoming much better understood is a third which qualifies the durable and long-standing syllogism about educational attainment and economic growth. It shows that while the research literature is ambiguous about the relationship between educational attainment and economic growth, there is evidence “that *quality adjusted* education is important for economic growth” (Van der Berg, 2008:10). This, of course, does not translate into a causal law about the relationship between education and poverty, but it does raise the question of the importance of the quality of education.

It is this question of the quality of education that this paper seeks to emphasize in working with the question of the relationship between education and the struggle against poverty. It is not simply the provision of education that matters but what it consists of. What it consists of, the argument will be made, is consequential in providing young people with the opportunities

to take greater control of their lives, to manage their lives in complex globalised environments, and, with this, to improve their chances of emerging out of poverty. How then, against this, does one think about quality in education? If one were to move beyond the simplistic aphorisms about what education can and cannot do, one perforce has to place the discussion of education and its quality in a more philosophical cast. If it is so, as the OECD points out, that “How to improve (educational) quality raises fundamental questions about societal aims, the nature of participation at all levels, and the very purposes of the school as an institution” (1989:9, cited in Lawton, 1994:1), then questions such as ‘Quality of what? Quality for whom? Quality in relation to what?’ and so on, need to be asked. These are not questions that can be answered in any *a priori* fashion but, as Angus notes, the meanings of these are “constructed out of the interplay amongst ideological forces in the wider society” (1992:379). In this sense, the attributes of these terms and their consequent indicators, become a function of political, administrative, and public conceptions as well as research and educational factors (see Hofstee, 1992:24-28; and Lawton, 1994:2-4).

Assuming, however, that some consensus may be reached on the purposes of schooling and on the meaning of quality therein, how does one know that the goals have been reached or otherwise? This introduces the notion of performance indicators. Now, while many meanings can be attached to indicators - indicators as ‘proxy measures’, as ‘symbolic representations’, as ‘performance gauges’ and indicators as ‘can openers’ (Smith, 1996:20), it is almost certainly true as Smith points out that “the meaning of quality retained by policy makers will condition the development of the education system” (p62), and following from this that “the indicators that are selected will push the education system toward the assumptions and beliefs they embody - that is, what is measured is likely to become what matters” (Burstein, Oakes & Guiton, 1992:410, in Smith, p21).

For this reason, and given that measures once instituted often take on a life of their own, irrespective of what purpose may be attributed to indicators, it is worthwhile considering some of the history of the domain and the record of indicators. It is also worthwhile reflecting on Hofstee’s observation that the location of the control of defining the concept of educational quality is critical (1992:27). Again, one is constrained to ask ‘Indicators for what?’ and ‘Indicators for whom?’ Given the consequences - financial, educational, administrative and political - that are attached to information, experience suggests that having a monopoly here will certainly not be to the best advantage of all the stakeholders (see Broadfoot, 1992:112).

As indicated, there are different reasons for, and numbers of ways of using indicators. Some hint of directions to take lies in the legislation where in terms of functions, provinces now have a responsibility for basic education and the implementation of national policy, while the Minister reserves the right to set policy, standards and norms including curriculum, examinations, certification and accreditation; to regulate information and the tertiary sector (National Education Policy Act (NEPA), No 27 of 1996, section 3). A first distinction might thus be made between the *policy* and the *management* levels which the NEPA implies. The significance of this has been detailed by Crouch (1996) elsewhere, but broadly relates to the question of “what indicators are used, who uses them and develops them, and why” (p2). In this sense there needs to be clarity about the meaning of indicators at all levels.

Thus at the policy level, purposes may be a statement of policy - in this way giving direction to the ‘system’ - as well as being concerned with the goals of policy. Thus, if equity and equality are policy goals, then the indicators should directly attempt to capture the information that demonstrates these. At this level then, indicators should act as both planning

aids and monitoring devices. This requires of course that the policy statements (objectives) are specified in such a way as to enable measurement (see Johnstone, 1981:7). Examples of data here are the commonly found system monitoring variables such as enrolment ratios, completion rates, resource allocation both human and material, employment rates and so on (see for example Crouch, 1996; 'Education in France. 30 indicators on the education system', 1996; 'Edufocus', 1997; 'Primary Education in Lesotho. Indicators 1992', World Bank, 1995:32-52). None of this is new or particularly difficult - all systems should be monitoring their goals. Unfortunately, the quality of data and/or the variables measured in developing countries often do not allow even this basic 'maintenance' function to be carried out (World Bank, 1995:50-52, and Chapman, 1991). At this level, mention needs also to be made of the need to include efficiency indicators. This is because without some control over inputs, gains in system goals may be jeopardised (see *inter alia* Crouch, 1996:3-4; Lockheed & Hanushek, 1988; and Meyer, 1997).

In passing, it is worthwhile noting the trend towards international comparison and the commitments of South Africa in this regard. As Crouch notes (1996:3), the system of indicators should be able to satisfy UNESCO or other needs relatively easily (in the sense that the data required is relatively uncontroversial). More important perhaps is the issue of cultural specificity that countries are commonly demanding in the face of evidence that there may be deleterious effects from the internationalisation of measures. If it is true that 'what gets measured counts' then global measures may drive countries in directions that as Vedder points out "can have crippling effects for individuals and societies" (1994:12). This is simply a note of caution against the wholesale 'importation' of indicators. However, even if it is well established that many (apparently neutral) concepts are culturally bound in interpretation (see Chetty, 1992; Meyer, 1997:5, and Vedder, 1994:13), this is not necessarily an argument for a relativist position. Given the impact of globalisation and the possibilities of 'global curricula', a position which eschews an international perspective can only be disadvantageous. Vedder's 'solution' is to argue for regional or national measures that satisfy international requirements without bowing to the demands for standardisation of curricula or other elements of education. The importance of doing this relates to the perceived benefits of learning from how others organise educational matters. (These benefits are 'perceived' in the sense that such transfer that does occur frequently does so as a function of ideological or political demand without the benefit of serious comparative research [op.cit.: 14].)

While these macro level indicators may satisfy the 'performance gauge' level, of more concern to us here are the managerial level indicators relating directly to schools and school performance. The difficulties here relate to the problem that "recognising an effective school is not the same thing as creating one" (Lockheed and Levin, 1993:8).

What are these difficulties? In the next section an attempt is made to describe what these are.

The central difficulty with respect to indicators is that the approach to quality – what should be the core characteristic of education – remains comprehensible only in quantitative terms, making quality, in the end a limited value. Thus while it is technically possible to collect as much information as is considered desirable (some check lists have over 1000 items!), this diagnostic information (the 'can-opener') and any follow up action which may occur will not axiomatically solve the problem. In the GMR, for example, quality is the idea of literacy and numeracy as instrumental skills necessary for young people 'to enter the labour market.' This approach is at many levels defensible. It is, it could be said, what ultimately counts – are the products of the schooling system employable?

Quality and Value

This paper will argue that making the question of employability the central question that education has to work with is limiting and even problematic. Making it even more problematic is the acceptance it enjoys in policy-making circles. An issue emanating out of this acceptance, as Kamens and McNeely (2010:10-11) point out, is the compulsion to standardise that it stimulates and the superficial engagement with the specific context it is seeking to address: “[there is] widespread agreement across nations about the desired outcomes of education” (ibid). Driving this agreement is the almost universal belief that it is held up, firstly, by the “hegemony of science... which contributes to the sense of a rationalized global world in which everyone is subject to the same kinds of causal laws” (ibid). These causal laws are assumed to hold for the globe and that they apply in the same kinds of ways for the diverse contexts in which education is provided. The second belief behind this approach is that societies are “like organisations... that can be managed...” (ibid) and that the standardised tools that are now available work equally well in any country.

The result of this standardisation has been to raise the standing of international agencies and the justification for their existence, namely, to “make mass education more accountable to society” (ibid). The major instrument to have emerged in this process has been the benchmarking test and the indicators on which it depends. Kamens and McNeely (2010:19), quoting from the work of Benavot and Tanner, say that 81% of economically developed countries and 51% of economically developing countries have been using, since 2006, national assessments of one kind or another. Almost all the economically developed countries are participating in more than one form of international assessment (ibid:9).

Care, however, is called for in how this discussion is taken forward. The basic caution needed is that of assuming that national and international assessments bring to a climax the struggle for quality. Important to come to terms with is the understanding is that what appear to be a gain in some respects and in some contexts may also represent a loss in others. Towards understanding these developments and to move forward it is necessary to make better sense of what the general consensus is all about. What are its politics? How does it deal with inclusion and exclusion of the people who make up a society? How does it deal with the rights and entitlements of these people? How does it understand, moreover, the process through which people come to make choices and decisions about the things they value? The first dimension to these questions, in many ways a predictable one, is that of citizenship. Who counts in determining the terms of the agreement? The second is no less important. It is about the substance of the agreement is and draws attention those things that are deemed to be valuable by the enfranchised. The question in its twin configuration brings to the fore the assumptions on which the consensus rests about how society is and should be organised? How conscious is it about the shaping impact on individuals and the society in the practices it is presenting as ‘strengths’?

Towards understanding the nature of the challenge of the first, that is approaching the new ‘universals’ on their own terms, it is necessary to understand what the criticisms are of the benchmarking tests and the processes around them.

The Problems of Bench-Marking

Helpful in understanding some of the issues in bench-marking and quality is the assessment of scholars such as Sayed (2010). Commenting on how quality has been interpreted in the Jomtien/Dakar discussions, the GMR and critically in the Progress in International Reading

Literacy Study (PIRLS), the Programme in International Student Assessment (PISA), the Third International Mathematics and Science Study (TIMMS) and their regional variations such as the Southern African Consortium for the Measurement of Educational Quality (SACMEQ) and the Latin American Association for the Assessment of the Quality of Education, Sayed says that

What has driven the policy potentates' concern with quality is what could be described as the assessment shock. This is the scramble for quick fix solutions to declines in student achievement scores in selected subjects as reflected in regional and international assessment exercises such as PISA, TIMMS, SACMEQ. There is no better motivation it seems, for ministers of education to act, than languishing at the bottom of a League Table, no matter how problematic assessments may be. (Sayed 2010:54-55)

Focussing on the GMR, Sayed asks what is problematic about these assessments? He makes four key points. The first is that they conflate good quality education with measurable progress in a limited range of learning areas that are assumed to embody the 'basic universals' - literacy and numeracy or Reading and Mathematics -without which progress and enrichment are impossible. In terms of this, quality is reduced to the satisfaction of 'basic learning needs'. For example, he says, no mention is made about social studies.

Sayed's second criticism is with the GMR and the broad framework used by the assessment agencies, TIMMS, PIRLS, PISA. He argues that the GMR has developed a framework of quality outlined in its 2004 report which posits an interrelationship between the factors of context, input, process, and outcome. However, it is unclear what the exact relationships are between these different factors and despite the awareness of the presence of contextual issues, the model that arises is very mechanical. At the outcome level, the GMR definition emphasises cognitive development on the one hand and values, attitudes, and citizenship on the other hand. How these materialise is not interrogated.

Sayed's third criticism with the bench-marking is that it fails to engage substantially with the key areas of teaching and learning and, particularly that it does not define what constitutes teaching and learning. Instead it reduces the notion of teaching and learning to cognitive achievement and quantitative measures such as the number of instructional hours (a common measurement in most GMR reports), number of assessments countries have carried out (nationally or internationally), and the list of subjects/learning areas. While these are important he says that they fail to look at 'pedagogy' - the missing element in understanding good quality education.

Sayed's fourth major criticism is that the GMR insufficiently focuses on equity. He argues that quality matters more for the poor as the wealthy have access to social and cultural capital that advantages them in education and compensates for poor quality. Current dialogue about education quality tends to ignore these issues. Essential to quality, is the extent to which teaching and learning is facilitated for the poor and the marginalised.

For critics such as Sayed, the idea of quality is proceduralised. This proceduralisation begins with the quick essentialisation of what is thought to be 'universal', the rendering of the 'universal' into what is effectively the mechanistic procedures of inputs and outputs and then the quantitative measurement of outputs on their own and, often, apolitical, terms. This produces what he describes as a 'narrow' view of quality. Its procedural elements are pre-eminent. This procedurality permits, once one has been able to distil an ideal form of quality

with its own distinctive features, the emergence of diagnoses which are able to classify unequivocally that which is good and which is bad and to be able to generate prescriptions of how the latter can be repaired. A further consequence is the emergence of ‘experts’ able to ‘home’ in on any context anywhere in the world and in relation to the universals detect what is not working and why. The school reform movement internationally subsists on this paradigm as is now evident in the emergence of quality assurance regimes in many countries (see Rassool, 1996). This produces what he describes as a ‘narrow’ view of quality which is evident in the approaches developed by the major quality assurance agencies around the world such as the International Network of Quality Assurance Agencies in Higher Education (see INQAAHE, 2004). The broad framework, in both its form and substance, they have come to develop is now recognisable in the instruments that are in use in countries across the globe where quality assurance processes have been adopted. It is used for assessing quality within countries and across national borders. While the K-12 assessment agencies, TIMMS, PIRLS, PISA and so on, go further than the higher education quality assurance agencies in that they look at actual attainment, the hegemony of what is assumed to be the universal is clearly imprinted on all the processes. The impact of this development is great. Adopted by national systems of education themselves in their own bench-marking assessments and actively promoted by the world’s major assessment agencies such as the Evaluation of Educational Assessment (IEA), the world has effectively come to a kind of consensus of what is assumed to be ‘value’ and how it might be recognised. This consensus is the basis on which countries then scrutinise their own standing and on which they are assessed to establish their degree of compliance with the international idea of value. If they are found not to be promoting the requisite standards, as Kamens and McNeely make clear, they are subjected to immense pressure: “Assessments are often mandated by international governmental organisations (IGOs) or become part of the loan conditions for loans to low-income countries set by international agencies like the International Monetary Fund and the World Bank (ibid:15). Out of these have developed ideas of how systems might then repair and improve themselves.

This line of reasoning brings one, then, to a second level of engagement with the idea of quality generated by bench-marking. Central in this second level are conceptual understandings of quality which open up the question of whether the proceduralised idea of quality is sufficiently encompassing to take in the diversity of value in the world. Taking the discussion in generous terms, has the dominant notion of quality reached its inclusionary limit?

American historian Larry Cuban makes the argument that the ‘larger view of education – learning from life experiences, involvement in the world and reflection even to the point of unlearning lessons from the dozen or more years of formal schooling – has become compressed and distilled into a narrow definition of a good school’ (<http://larrycuban.wordpress.com/>). Historically he argues, there have been diverse versions of good schools that educate children and youth toward different ends than the present orthodox view that argues that good schools serve the economy by producing skilled and knowledgeable graduates for the labour market. “Such group-think among very smart people” he continues to say, “(f)orget(s) that democratic governments require many different types of good schools..... Schools are, and have been, vital institutions that sustain democratic ideas, thinking and action. (We) need more than one version of a good school” (ibid). We might say the same for the global context.

Cuban's view is crucial in thinking about quality across different social contexts and helps us to ask whether the proceduralised approach that is now dominant excludes and what it excludes?

It is here that the international discussion is at its most vulnerable and would need to look much more deeply at a meaning of quality which will be able to work with the complexity of the global order as opposed to that perceived to be its best. At the heart of these challenges are the questions of standards and the notions of universalism and particularism.

The first step in thinking about these questions is the old matter of the desirability of a universal standard. Pragmatic reactions to this question are that quality is by its very nature an exclusionary idea and that the world needs to adjust to this reality. This view is implicit in many definitions of globalisation and particularly those that make the argument of a standardised and uniform new world order. In this new world order, "we need", the National Education Goals Panel (1993) asserts in 1993 already "graduates who can compete in the global economy. We need adults who can use the knowledge and skills they acquire in school to deal with the complex issues of their communities and the world". It is taken into government policy everywhere. The argument is almost indisputable. But its assumptions are not fully tested. Who is the 'we' in these statements?

How these developments play themselves out can be seen in the mechanics of quality assurance around the world such as the International Network of Quality Assurance Agencies in Higher Education. The criteria that are in use now in virtually every country of the world, and used for assessing quality across national borders, are essentially about the form that educational systems should have and what should be within them. The K-12 assessment agencies, TIMMS, PIRLS, PISA and so on, go further than the higher education quality assurance agencies. They look at actual outputs – the attainment, in terms of learner scores, that these systems are producing. When this 'output' is then taken into the world of the major assessment agencies such as the International Association for the Evaluation of Educational Assessment (IEA), a view of quality is produced which has the effect of 'norming' the world in particular kinds of ways. Countries that are assessed are then deemed to either be or not be in good standing in terms of quality. If they do not, as Kamens and McNeely insightfully explain, they are subjected to forms of coercion and pressure to conform: "Assessments are often mandated by international governmental organisations (IGOs) or become part of the loan conditions for loans to low-income countries set by international agencies like the International Monetary Fund and the World Bank (ibid:15). A kind of 'tool-kit' mentality is the most visible form of conformity in this development.

The impact on countries such as South Africa of this kind of tool-kit syndrome is extreme. It presents to a country like South Africa the idea that its parlous performance in the TIMMS and PIRLS exercises, and more embarrassingly, in the SACMEQ assessments, is relatively easily reparable. This approach invariably reaches the point of desperation where a standardised learning framework is placed in the class which is presumed to be 'teacher-proof' and guaranteed to work for any child. A recent minister of education, prompted by 'best practice' ideas of 'time-on-task' had scripted lessons outlined which laid out in fine detail what the teacher ought to be doing step-by-step in a foundation class. The idea was motivated by good intentions, but it fundamentally misunderstood the problem of the classroom as a simple managerial space, or, to return to the comment made above, of an organisational structure that is amenable, everywhere to the same corrective prescriptions. The process of teaching and learning is not a mechanical one. This mechanical approach is

unable to see the big picture. A big picture approach requires a deep understanding of the context of teaching and learning, with deep as opposed to superficial theories of the complexity of the ways in which the diverse elements that come to make up the everyday classroom are constituted. Much of the universalist approach proceeds from the assumption that the teaching and learning as it happens in the diverse parts of the globe has no history. More to the point, and this is the effect of the new universal, it is only approached with what is thought to be the lack or the shortcomings relative to the universal standard. Unpublished work of doctoral student Leadus Madzima (forthcoming) at the University of Cape Town on high achieving low socio-economic Grade 12 learners in Harare, Zimbabwe, is making clear not only how complex these under-resourced learning environments are but how much agency is present amongst the learners themselves. The next step in the mechanical diagnosis of how low-performing systems can be fixed - filling their lacks with imposed and inappropriate solutions – reveals how little the undeclared suppositions, intuitions, guesses and hunches grasp what the real problems are. There is little sense of what is *actually* there in these contexts. With respect to the teachers, there is little understanding in any detail of what the skills or capacities of the learners actually are. It is not known, interestingly, what they *can* do. What the universalistic approach does is to read them in deficit terms. The kinds of competency tests given to children only produce them as subjects with lacks. It is not known, furthermore, with any great clarity, what teachers can and cannot do. What universalist approaches then do in relation to these over-arching approaches is then often to misrecognise the contexts in which education – teaching and learning – actually takes place.

Quality, Values and Universalism

Taking the discussion into the arena of standards opens up many questions. Key amongst these is that of the kind of universality invoked in bench-marking. There remains, it needs to be noted, opposition to the idea that dominant approaches to reading and writing constitute ‘good education’. Significant in this criticism is that these dominant approaches have served to marginalise the knowledge systems of large swathes of the globe even in the economically developed world itself (see Adams, 1997; Brady, 1997:421; Banteyerga, 1994, who argues that “‘modern education’ is not satisfactorily addressing the problems of Africa to meet the needs and aspirations of the African people” and Nekhwevha, 1999.)

The reason for drawing attention to this is to emphasize that there remains a concern in several parts of the world with what is perceived as the assimilation project of the school, both validated and celebrated in high-stakes testing. The question raised by this criticism is that of what is validated in bench-making and what future there is for knowledges not perceived to be of value. Odora-Hoppers (1991:1-2) makes the point in a thesis written almost twenty years ago

Questions like "What kind of education?", "For whom?" and "Why?" were not only matters of personal agony to me, but also questions that seemed to occupy the minds of many other thinkers in education. Was the task of education social mobility, the transmission of the normative heritage of a people, or is it the training of people to work in factories far away from homes that nourished them? Who produces food when all children go to school 6-8 hours everyday, and what does compulsory schooling have to say about women's increasing workload and the overall deteriorating food self-sufficiency in Africa?

At the heart of these questions is the appropriateness of the kind of education made available and privileged over that which has been able to support the livelihoods of people in several parts of the world.

3. Performance Indicators in South Africa and How They Might Be Used to Address Poverty?

In this section of the paper, we explore the possibilities that education indicators might offer to poverty reduction measures. First, we argue that it is important to explore the nature of indicators in education, and what possibilities and limitations they afford. Secondly, we consider the argument that indicators may play an important role in ensuring accountability, particularly in terms of reciprocal and multidirectional accountability. Thirdly, we argue that debates on indicators, together with the education systems they are part of need, to be considered in relation to broader social patterns, since it is here that possibilities for change are mainly located. Finally, in exploring indicators and the aims of education, we argue that issues of education and poverty should be understood in ethical and political terms. In these terms, we argue, it is important to use indicators in ways that do not hollow out the aims and purposes of education. Our concern here is to work with indicators against the poverty of education and towards a more just society.

What do indicators indicate?

In this paper we have made reference to student achievements on international and local benchmarking tests, increasingly used as indicators of comparative performance. We have noted that South Africa has performed extremely poorly on international tests such as TIMSS and PIRLS as well as SACMEQ, and that student performances on ANAs are similarly extremely poor.¹ These test scores provide indicators of problems in performance and therefore problems of quality. They also provide indicators of the embedded relationship between poor performance and poverty.

In saying this, it is important to recognize what the tests are testing, in order to interpret the significance of indicators. Though tests are written by individual students from specific schools, the results are not simply reflections of individual performances. Rather, the patterns they reveal reflect the performance of the education system as a whole. International tests provide indicators of comparative national performances on a limited set of tasks, while ANA tests assess the performance of comparative cohorts of students across the country. Test results are, by now, almost entirely predictable, and performance is incontrovertibly correlated with indicators of socioeconomic status (SES).

In this sense, comparative test scores are indicators of what research in sociology of education has demonstrated over the last forty years and more within different countries: that the outcomes of schooling are heavily dependent on the home backgrounds of students. The genre of large scale international testing enables comparisons between countries, thereby illustrating on a different scale what national tests have established within countries for decades: the overriding significance of home background or socioeconomic status (SES) on school performances.

It is interesting, in this regard, to note Helen Ladd's (2012) comparative analysis of PISA reading scores measured against the OECD construct of economic, social and cultural status (ESCS) in 14 high performing countries. In all of these countries there is a strong correlation between students' achievement and family background – though the extent of this differs

¹ Results in 2011 for Grades 3, 6 and 9 confirmed that levels of performance were extremely low in language and mathematics, with the mode in all cases being less than 20% (Department of Basic Education 2011).

across countries. High performing countries such as Finland and Korea are comparatively more equitable, for reasons that Ladd links to history and local conditions. The differing international patterns that Ladd's analysis points to illustrate the global extent of the systemic nature of the relationship between education and social inequality, including poverty.

In South Africa, numerous analyses of test performances have affirmed the significance of race and SES in producing unequal results (Christie, Potterton & Butler 2007; Fleisch 2008; Gilmour & Soudien 2009; Howie 2001; Kanjee 2007; Reddy 2005, 2006; Department of Basic Education 2011). Whereas earlier 'production function' research showed the effects of race and SES operating at the level of the school (van der Berg 2005, 2007), more recent multilevel analyses have disaggregated these findings further (Frempong, Reddy & Kanjee 2011; Smith 2011). Evidence from these studies shows that apartheid inequalities are entrenched for all but a small group of black students in desegregated urban schools.² Moreover, research by Frempong et al (2011) shows that learners from low SES backgrounds are not as successful in high-achieving schools as high SES students are. Extending this point further, there can be no doubt that South African children in poverty face the double disadvantages of poor home backgrounds and poor schools.

As alluded to earlier, the relationship between SES and student performance in international tests applies across countries. There are 'disadvantaged schools' in all participating countries. It is important, therefore, to consider the extent of disadvantage in different countries, and to recognize that the conditions and experiences of 'schools on the edge' of most OECD systems are the conditions and experiences of the majority of schools – 'schools in the middle' of the South African system. In broad brush, the landscape of South African schools may be viewed in three sections: a relatively small number of former white and Indian schools that were historically well resourced and remain the most privileged in the public system; a large number of 'schools in the middle' in relatively poor socio-economic circumstances, with a continuing legacy of inadequate resourcing and poor performance; and a number of schools, mainly African schools in rural areas, that operate in conditions of extreme poverty and hardship. It is these conditions that underpin the recurring patterns of achievement and underachievement on national and international tests.

Given how closely test performance tracks socioeconomic status and former racial departments, and how poor the actual performance is in literacy/language and numeracy/mathematics at all levels of schooling, it is clear that the system as a whole is in crisis. With the mode score on all of the ANA tests in 2011 being less than 20%, it is clear that the schooling system does not provide access to basic learning for the majority of students, let alone quality learning. While individual students, and by implication their teachers and schools, must bear the personal experience of failure, it is important to recognize that the predictable patterns of performance, and failure on this scale, are indications of systemic, rather than individual, failure. In other words, indicators need to be read as pointing – valuably – to the patterns of systemic failure and the interventions that may be needed.

Failure on this scale, related as it is to the inequality and socio-economic hardship that are endemic in the broader society, cannot be remedied by schooling alone. As Willms (2006) concludes from his comparative research on *Learning Divides*, in order 'to raise and level the learning bar' in situations of poverty and inequality, it is important to have broad long term strategies that address conditions outside of school as well as inside. This is echoed in the

² Even in these schools, performances by race are unequal

OECD's (2012) report on *Equity and Quality in Education: Supporting disadvantaged students and schools* which suggests that a range of interventions and supports are necessary, and points out that 'in many cases, education policies alone are not enough' (2012: 112). In the South African context, Michele Smith's (2011: 81) multilevel analysis of test scores makes a similar point: '...social policies targeted at improving well-being in deprived neighbourhoods would have a substantial impact on educational outcomes.'

Returning to a consideration of the role that indicators may play in addressing the poverty-education nexus, the metaphor of a thermometer is useful. Comparative tests scores are similar to taking a temperature; this is helpful in identifying that there is a problem, but insufficient in diagnosing the nature of the problem and providing a cure. Indicators may play an important role in identifying where the system has problems, but they have limited value in remedying problems.

While it may be useful for departments, districts and schools to analyse indicator data and develop strategies for improvement on the basis of analysis, this is a capacity that cannot be assumed and is likely to require support. Where indicator data are used punitively, or to hold schools and teachers to account without providing necessary support, they may in practice have detrimental effects (see OECD 2012; Ladd 2012).

What has been argued in this section is that test scores are indicators of systemic performance. Extending the use of indicators beyond test scores, it is possible to develop indicators to track government performance in measures to address the problems that are by now well known. It is to this that we now turn.

Indicators and accountability

While it is true that indicators may play a useful role as accountability measures, it should be recognized that accountability does not take a single form. Where indicators of performance (such as performance on tests) are in fact indicators of disadvantage, issues of accountability are more complex. This is well articulated by Richard Elmore, who draws attention to the importance of internal capacity in school functioning. In his words:

Accountability systems and incentive structures, no matter how well designed, are only as effective as the capacity of the organization to respond. The purpose of an accountability system is to focus the resources and capacities of an organization towards a particular end. *Accountability systems can't mobilize resources that schools don't have....* The capacity to improve precedes and shapes schools' responses to the external demands of accountability systems (2004:117, emphasis added).

The point about internal capacity to improve is also picked up by the OECD (2012) Report, which notes that:

Low performing disadvantaged schools often lack internal capacity to improve ... A combination of external support and internal development is often necessary to generate positive change and improvement. (2012: 113)

A case in point is teacher capacity to improve their classroom instruction. The Department of Basic Education notes in its report on 2011 ANA results that teacher tests confirmed that many teachers themselves did not have foundational subject knowledge and concept mastery.

That being the case, it is unrealistic to expect improvement in student performance unless teacher subject knowledge and understanding is improved.

As argued in the *Schools that Work Report* (2007), raising capacity at school level is crucial for school improvement. This means raising the school's ability to engage successfully with the central task of teaching and learning, which requires support through leadership and management as well as parent and community relationships. Following Elmore's logic, change needs to begin with whatever capacity already exists at school level in terms of teaching practices and organisational arrangements, and built from what exists. Elmore develops the notion of reciprocal accountability as a means of building capacity in schools:

For every increment of performance I demand from you, I have an equal responsibility to provide you with the capacity to meet that expectation. Likewise, for every investment you make in my skill and knowledge, I have a reciprocal responsibility to demonstrate some new increment in performance (2004: 93).

This approach to building capacity holds both the schools and education departments accountable, in a reciprocal relationship. Education departments cannot expect improvements from schools if they do not provide the support needed to achieve improvements; and on the other side, if schools receive support, they have a responsibility to demonstrate improvement.

This is not to suggest a simple process of accountability and improvement, but a complex one that begins with a good analysis of what is required for improvement, and how this may be achieved. In this process, accountability runs both ways, and indicators may then play a role on both sides. Indicators of performance improvement (or lack thereof) are judged against indicators of targeted support in multidirectional relationships of accountability.

Performance indicators for government departments are not a new step. What is different in this proposal is the development of indicators that match the needs of school improvement, and the linking of these indicators with accountability measures for schools. It is worth noting here that school improvement is recognized to be a complex, multidimensional and lengthy process (see Fullan, OECD). There are no 'quick fixes' to be had, but incremental steps may well be planned, supported and measured by appropriate indicators. In doing this, it will important that appropriate but ambitious performance targets are reciprocally set and adhered to. Within such a framework, it is likely that indicators would be more refined than the simple measures of student performances on tests. It is also likely that approaches such as value-adding would be introduced to measure accountable performances.

Performance indicators understood in terms of broader social contexts

As earlier sections of this paper have argued, patterns of performance on tests are closely related to broader social patterns of power, and in particular in South Africa, to patterns of race and class. The presentation of bare test scores as indicators suggests that the numbers presented are comparable, and that like is being compared with like. In practice, the numbers are products of social contexts and these are not the same across all sites (be they across or within countries).

What needs to be recognized is the broader political context of all performance and accountability measures and indicators. As mentioned earlier, test performances have a

diagnostic use, but beyond signaling a problem, they do not straightforwardly signal solutions.

The case of teacher performance in South African schools is illustrative. If ‘the problem’ is constructed as being one of shirking teachers protected by a militant union, the solution may well be to break the union and to incentivize individual teachers with performance pay and dismissals (in practice, very hard to achieve). If ‘the problem’ is seen as being entirely due to structural inequalities, the solution may well be to expect no change until a more equitable society is achieved. Both of these extremes are unlikely to achieve improvements in school performance.

In South Africa, improvements in schooling need to be achieved in the interplay of social and political forces. The current situation is a product of apartheid and the struggles against it, but also of the policy decisions and actions by post-apartheid governments, acting in the context of global neoliberalism. None of these can be willed away, and these conditions must be worked with to achieve desired changes.

At this point, it is useful to look at the analysis and proposals of the National Planning Commission (NPC) with regard to schooling. The NPC begins its discussion on schooling by acknowledging the importance of teachers in achieving quality schooling. It recognizes the importance of teacher content knowledge, looks forward to a future where teachers ‘are recognized for their efforts and professionalism’, and proposes that ‘teacher remuneration should be linked to their performance while taking into account mitigating factors such as the school environment and socio-economic status of learners’ (2011: 261).

What this approach glosses over is that performance pay is a contested issue, and one on which there is no agreement between academics or policy about its effectiveness in improving performance. Performance pay holds individuals to account for what is a collective task in schools, and one where ‘value-adding’ is not a matter of straightforward agreement. Nor can the power of teacher unions be straightforwardly removed from the calculation – as experience in other countries as well as South Africa indicates.

The NPC diagnoses the problems in the low quality education system as stemming from two sources: weak capacity in the civil service (from teachers and principals through to system officials), and an accompanying culture of patronage and nepotism.

It is perhaps not surprising that the NPC proposes that ‘to build technical capacity in education requires a political consensus’ in which all parties stand to gain as long as they make concessions. What is glossed over is that this would take enormous political will – in a situation where all indicators are that this will is lacking. The solution to the lack of capacity is a proposal to develop a turn-around strategy for 20 000 schools, involving multidisciplinary teams of professionals working for reduced pay for up to six years.

In fact, a basic pact for teacher development already exists, stemming from the Teachers’ Summit of 2009. This is set out in the form of the *Integrated Strategic Planning Framework for Teacher Education and Development in South Africa 2011-2025*. The ISPFTE – a stakeholder agreement including unions and the two departments of education – proposes a professional development approach to capacity building, which is quite different to the competency and testing strategy suggested in the NPC Report. (In this regard, it is interesting that the NPC proposes competency testing as its first step, and sees no contradiction between

this and the professionalization it purports to advocate). The ISPFTE proposes the development of Provincial Institutes to provide structured teacher development opportunities, as well as the establishment of professional learning communities (PLCs). These proposals foreground the need for systemic support and for institutionalized building capacity, and promote the notion of teaching as a collective, rather than an individual endeavour.

This is not to argue straightforwardly that one approach is better than another (though there is that too). Rather, it is to suggest that interventions to improve school quality will need to work with teachers, unions and school communities towards shared solutions. As argued earlier, capacity building is an essential first step towards building reciprocal accountability. All indications are that changing schools takes time – and in the case of South Africa, it will require targeted interventions which support schools and students in circumstances of poverty and hardship. The NPC notes that ‘the legacy of low-quality education in historically disadvantaged parts of the school system persists’ and that ‘this seriously hampers the education system’s ability to provide a way out of poverty for poor children’ (2011: 269). This comment glosses over the extent and depth of disadvantage in the schooling system, which, as we have suggested earlier, is unlikely to be able to provide a route out of poverty without measures outside of the school.

Aims and purposes of education: ethical considerations raised by indicators

Last but by no means least, in exploring the possibilities of education indicators in addressing poverty, we turn to ethical considerations relating to the nature and purposes of education, as a basis for concluding comments on indicators for education and poverty.

Ethics, as used here, refers to practices of continually thinking about how best to live together with others in the world we share. Education as a social endeavour is itself imbued with ethical considerations, and these need to be at the forefront of considerations about education and poverty.

Elsewhere, Christie (2005) has argued for the importance of an ethics of engagement in education, building on three interrelated strands:

- An ethics of commitment to intellectual rigour where we strive continually to understand our conditions of existence in all their complexities, and cultivate a disposition of enquiry
- An ethics of civility in which we actively build the conditions for a democratic public space
- An ethics of care in which we acknowledge the significance of our care of the other, prior to any concerns for reciprocity or mutual obligation

At its best, schooling is about creating spaces of teaching and learning that enable students to make sense of the world they share with others, in ways that will enable them to change it for the better. An ethics of engagement in education entails building dispositions of enquiry, cultivating awareness and concern for a common good, and facing the suffering of others with a willingness to care. At its best, education is about enabling people to make sense of the world they share with others, so that they are able to imagine alternatives and change the world for the better. These are the deeper goals of education which should not be surrendered when indicators are developed.

None of the countries participating in international benchmarking tests would hold out the skills and competences that these tests measure as encapsulating their full aims for education. In all cases, the aims of national education systems go far beyond such minimalist goals. Similarly, the ANA tests measure basic skills and competences; they do not measure the goals of the constitution and the ideals for education set out in various policy documents. Tests have their value, but they also have their limits. There is always a danger – widely recognized in countries that participate in tests – that basic skills may come to dominate curricula, and indeed there are accounts of the perverse effects of testing in narrowing curricula as teachers strive to achieve good results through ‘teaching to the test’. The accompanying danger is that habits of the mind and social values that are not expressed in the form of tests may be underplayed in practices that emphasize performance. Where this happens, the substance of education may be hollowed out into a performative shell, which emphasizes individual achievement at the expense of building a common good.

In this section of the paper, we have argued for the possibilities of speaking back to indicators as a way of engaging with poverty and education. Our concern has been to establish ways to work with indicators against poverty in education. While it is possible to work with indicators in this way, it is also important to work beyond them. Our goal is to work towards an education system of quality for all students, against the poverty of education.

4. Alternative Approaches and Alternative Indicators: The Capabilities Approach

It is entirely understandable why we have come to focus on the quantitative dimensions of development. For many countries it is the only way in which they can assess their progress. Even though the point has been made repeatedly since the 1970s that a much wider view of education should be developed, it has been difficult to move the discussion beyond the quantitative (see Malangiri, 2003). UNESCO has been an important player in trying to make this move. But, even it has struggled to articulate what it means. How, therefore, has it explained what quality is? The GMR Report for 2010 is valuable for this purpose. After acknowledging that the challenge of achieving quality is difficult, more difficult even than getting children into school, it attempts to spell out what it understands by quality through stating the purpose of education. This purpose, it argues, is that of “ensuring that children acquire the skills that shape their future life chances” (ibid). This is an important statement to make. It is informed by Amartya Sen’s (1999:84) idea of giving priority to the substantive freedoms of the individual, that is freedoms that concentrate on the capabilities of people to do things, as he says, “that they have reason to value” (ibid).

What is the alternative offered by Sen?

The alternative offered by Sen has broadly come to be presented as the ‘capability’ approach. It has also been developed conceptually by Martha Nussbaum (2006). It essentially argues that people should be able to and should have the freedom in their lives to expand their capabilities. The freedom that it speaks to is the freedom to achieve ‘functionings’ that are important to them (Unterhalter, Vaughan and Walker, 2007 para 2). ‘Functionings’ are understood “as the valuable activities and states that make up people’s well-being, such as having a healthy body, being safe, or having a good job. They are related to goods and income, but they describe what a person is able to do or be as a result’ ...they are ‘the substantive freedom’ a person has ‘to lead the kind of life he or she has reason to value’” (ibid). The term ‘capability’ refers to a person’s ability to achieve a given functioning. Clark

(2005:4) explains that “a person may have the ability to avoid hunger, but may choose to fast or go on hunger strike instead.”

The value of a capabilities approach, say Unterhalter et al (para4) is that it seeks to place the practice of education in a broader framework than simply that of what its inputs or outcomes might be. It is broader also than simply the subjective satisfaction that people say they get out of education. Acknowledging that people have different needs it works with the challenge of the socio-economic differences that arise in society and raises the key question of *how* people are able to convert what they have at their disposal or have been provided into capabilities (Ibid para 6). Working with this acknowledgement “opens a space in which we can be critical of school processes within a normative framework with a sense of universality. Is school education always beneficial to an individual’s overall capabilities in life?” (para 18). What a critical engagement with this acknowledgement raises is the relationship between what people might value themselves and what would be of value to them. It raises the question of the circumstances that that would need to be present to allow a person to make the kinds of choices that would be of value to him or her. Unterhalter et al (para 17) argue that “we would need [therefore] to specify at least a few core capabilities that education would seek to develop regardless of whether or not a child chose them.”

A key capability generated out of this discussion is that of *autonomy*. Nussbaum “insists that in the interests of democracy and tolerance in society, children should develop their capability to reflect and plan in an autonomous way, even if as adults they choose a non-autonomous life. Nussbaum is also clear that in the case of children we require that they remain in compulsory education until they have developed the capabilities that are important in enabling them to have genuine and valued choices, for example to exit from a traditional community” (para 17).

What does the capability community say about bench-marking? To understand this approach it is necessary to recover Sen’s broad approach to poverty. Sen (1998: 87-88) argues that poverty can sensibly be described as capability deprivation. Capability deprivation is that which is intrinsically important as opposed to those things that are *instrumentally* important, such as low income. He emphasizes that there are important influences on capability deprivation that need to be understood and that these are profoundly contextual. Low income is one. But, and this is the key point, the instrumental relation between low income and capability is variable between communities and even between families. Age, gender, social roles and social positions and other factors over which individuals have no control are all crucial. They can in either their own right or in combination qualify the meaning and significance of income as an indicator. The point, as Sen (1998:109) argues, is that income is a homogenous magnitude whereas capabilities are diverse. What is required therefore is an approach which facilitates the *realisation* of capabilities. What will increase the individual’s chances of realising his or her capabilities? Clearly low income is important, but it isn’t important in an absolute way. It is for this reason that he focuses on the idea of functioning and the capability to achieve valuable functioning. It is how one gets to what these functionings should be that distinguishes Sen’s approach. He argues that to get to the point of determining what is valuable calls for a public participation approach.

The problem is not with listing important capabilities, but with insisting on one predetermined canonical list of capabilities, chosen by theorists without any general social discussion or public reasoning. To have such a fixed list, emanating entirely from pure theory, is to deny the possibility of fruitful public participation on what should be included and why... public discussion and reasoning can lead to a better

understanding of the role, reach and significance of particular capabilities....(Clark, 2005:7).

In response to this Nussbaum (Garrett, 2008 para 12) is more open-ended. While she begins from the premise that there are particular things which are essential to the making of a human life, such as being able to live a human life of normal length, bodily health, bodily integrity, senses, imagination and thought, emotions, practical reason, affiliation, being able to live with other species, play and having control over one's environment in a political and material sense, she however wishes to protect the idea of autonomy (Nussbaum, 2006:310). Speaking specifically to the capabilities education should cultivate, she argues for the primacy of three values: the first is the capacity for self-criticism and critical thought about one's own traditions; the second is the ability to see oneself as a member of heterogeneous communities and the third is what she describes as the 'narrative imagination', the ability to 'think what it might be like in the shoes of a person very different from oneself.... For this ability we need literature and the arts' (Nussbaum, 2006:9). It is here that the capability theorists make their criticism of bench-marking: "Here the demands of the global market have made everyone focus on scientific and technical proficiency as *the* key abilities... To the extent that they are the focus of national discussion they are recast as technical abilities themselves, to be tested by quantitative multiple-choice examinations."

5. Conclusion

How one works with these alternative ideas is an obvious question. There are at least three lines of possibility which can develop from these ideas

- The levels of indicators ie national vs provincial/school markers that could be developed (are these the alternatives? Ie policy frame vs intervention)
- The location of the monitoring agencies
- The educational purposes contained within the selection of indicators

One way of bringing us towards an answer lies in the work of philosophers who have been thinking about standards. Howell (1998) has suggested that we could begin to think about standards and diversity by taking a lead from the Rawlsian discussion on the 'needs' of persons. His approach begins with Rawls' concept of primary goods which essentially argues that a primary good is that which is available to everyone which will enable them to make claims on social institutions based on their publicly recognised needs. Rawls identified two kinds of primary goods, Type A and Type B one. The first enables citizens "to exercise their political rights and fulfil their political responsibilities" – such as the capacity to vote, to participate in public life and to be self-supporting (Howell, 1998:5). The significance of a Type A good is that it does not depend on any contingent fact about an individual or a group of people. Everybody must have it. It should not vary from one region or one part of the world to the next. A Type B good is that which has wide public appeal and is likely to win public support and avoid sectarian claims on it. Unlike Type A goods, however, Type B is open to the contingency of regional variation and so does not require exactly the same distribution everywhere. It would seem that approaches to quality could move in the direction of a framework which will in a conscious and deliberate way begin to work with what Rawls understands to be Type and Type B understandings of what is valued. A TIMMS, for example, bearing in mind Sayed's cautions, could have elements of a test which are of a Type A nature and, clearly, those which reflect the contingency of the local.

In attempting to make this approach work lies difficulty but also possibility. The difficulty is in managing the conditions of difference of value and particularly of accessing both the explicit and the coded value elements inherent in the difference of the other and, thereafter, in a deliberative way making judgements of value and in determining what is of value and what

not. The possibility lies in reconstituting the basis of our relationships with each other and in opening ourselves to the possibility of building a common sense of value – one in which we, together, have participated.

Given our common humanity and the fact that we share a common space for which we have a common responsibility we need to be constantly striving to build a sense of the possibility of defining common value.

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Hollowing out therefore need ethics

Hopkins – construct and measurement validity

Canada indicators – can openers etc

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