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PREFACE
Virginia Roach

We continue our celebration of the 40th anniversary of the International Society for Educational Planning (ISEP) by beginning this issue of the journal with a reprint of an article by Dan Inbar that first appeared in *Educational Planning* in 1975 entitled *Educational Planning, Power, and Implementation: The Concept of Degrees of Freedom.* While 35 years old, the article provides an interesting framework with which to contemplate contemporary planning strategies from the perspective of their likely success, as predicted by Inbar's model. Conversely, the other articles in this edition of the journal provide a vehicle for testing the model in contemporary educational and governance environments as a way to test its contemporary utility.

Inbar's model suggests that educational plans are distinguishable by their "degrees of freedom," or ability to tolerate "choice and change of direction" based on the nature of the plan's complexity and the degree to which the plan relates to technological ("rational" and tangible objectives) versus social or behavioral change. He posits four primary categories of plans, based on two continua: (a) social v. technical domains and (b) explicit v. tacit knowledge. Implementing the categories of plans is a function of utilizing different types of power, from coercive to consensual "re-education." Planners should iteratively consider a plan's degrees of freedom and implementation power needs to maximize the likelihood of success.

Rahimy's article on the effectiveness of translation programs at the undergraduate and graduate levels in Iran is a systematic look at perceived program deficiencies, determining the root causes of those deficiencies (curriculum), and suggesting ways in which curriculum planning might be enhanced. Rahimy does this through gathering in-depth and systematic feedback both internally (from instructors and trainees) and externally, through practicing translators and international comparison of curricula. By noting categorically that deficiencies are not borne out of instruction, but rather curriculum, Rahimy defines the problem as "technological-engineering" in Inbar's nomenclature. Interpreted through the lens of Inbar, this approach to planning would suggest a more coercive implementation strategy such as legislation or regulation. By framing the study as a technological plan (according to Inbar), Rahimy also decreases the "degrees of freedom" needed in the plan. In fact, Rahimy's recommendations are consistent with Inbar's model as Rahimy suggests specific curricular change consistent with the Ministry of Higher Education's approved program length. He specifically offers both additions and deletions to undergraduate and graduate curriculum, as Inbar would expect through the power of professional authority.

Gabriel and Galligar's article describes an economic teaching capacity model "to quantify the relevant opportunity costs" related to enhancing undergraduate education through greater exposure to full-time, tenure-track (and presumably research active) faculty. Their model suggests how higher education institutions can manipulate the variables of faculty assignment (from graduate to undergraduate courses), teaching load (course load per faculty), and number of tenure-track faculty to develop plans for enhanced undergraduate satisfaction, which leads to stronger institutional viability. In Inbar's model, this is considered a "formal-social" plan and implementation is dependent on "manipulative persuasion" where participation and cooperation of the faculty is dependent on their understanding that it is their best self interest to do so. Gabriel and Galligar describe an approach institutional leaders may want to consider when planning; the reader is well-advised to contemplate Inbar's model before broadening the discussion to faculty!

At the other end of Inbar's spectrum, Menna's study explored the relationship between Canadian school board members' "espoused values and underlying assumptions" in relation to their goal setting and policy development. His findings, "that both quality of life and standard of living had consistencies and inconsistencies between and within school boards, as between professional and personal roles, and as defined within the framework of purposes of education," reflect a complex landscape where, as Inbar noted, high degrees of freedom are needed to implement change. In this type of "informal-social" planning, change comes through "re-

education" to influence "attitudes, norms and values," (Inbar). In this scenario, implementation requires participation to influence values which, in turn, shape policy. This type of planning is qualitative in nature, and in some respects, the antithesis of formal-social planning which relies on the quantification of human participation and production. Menna makes the case for understanding value orientations and conflicts in values as a way to understand the difference between value and policy and a vehicle for planning to bring policy in alignment with a community's values. Indeed, under Inbar's model this planning requires the greatest degree of freedom and, hence, needed power to actualize.

Thus, the three articles presented in this issue serve as examples of three of the four types of plans initially proposed by Inbar 35 years ago. Inbar's work enriches each of the three treatises by suggesting that planning must simultaneously consider implementation. The assumptions that framed each of the three studies, analyzed through Inbar's framework, suggest potential considerations for implementation. Gabriel and Galligar's model suggest the need for manipulative persuasion, Rahimy's the need for coercion through regulation, and Menna's the need for "re-education" through consensus. For students of planning, the question to ask is, are the approaches to planning discussed in this and other issues of *Educational Planning* artifacts of the researcher and/or planner or artifacts of context and phenomenon about which the plan is created?

ABOUT THE EDITOR

Virginia Roach, EdD, is Associate Professor of Educational Administration and Policy Studies at The George Washington University. She has worked extensively with state and national policymakers in planning and policy development related to governance, inclusion of students with disabilities, and teacher and administrator development. Her current research interests include planning policies and programs related to administrator development, and women in leadership, both in the U.S. and other countries. (vroach@gwu.edu)

ABOUT THE GUEST REVIEWERS

Mahmoud A. Abdeen, PhD, is Professor of Educational Planning, Administration and Economics of Education at Suez Canal University and the founder and Director of the Professional Academy for Teachers (PAT) in Egypt. He has directed a number of projects worldwide related to educational planning and policy. (abdeen_1@hotmail.com)

Shawn Joseph, EdD, is currently a director of school performance for Montgomery County Public Schools in Maryland. He is the 2009 Maryland State Middle Level Principal of the Year. His research interests include principal development and leading for equity. (Shawn_Joseph@mcpsmd.org)

Mike Mitchell, EdD, received his doctoral degree from The George Washington University in 2009. He is currently employed as a special education coordinator at the secondary level for the Bartow County School System in Georgia. (shaggy11@gwmail.gwu.edu).

Abebayeha Tekleselassie, PhD, is Assistant Professor of Educational Administration and Policy at The George Washington University and instructor of educational planning. Research interests include: resiliency among at risk students; job satisfaction and mobility patterns of school principals; educational reform and policy in the international context; and women and minorities in educational leadership. (silassie@gwu.edu)

ABOUT THE AUTHORS

Paul E. Gabriel, PhD, is Senior Associate Dean of the College of Arts and Sciences at Loyola University Chicago. He also holds a faculty appointment as Professor of Economics in the School of Business Administration. Dr. Gabriel's current research interests include human capital analysis and resource allocation issues in higher education. (pgabrie@luc.edu)

Di Di B. Galligar received her Ph.D. at Loyola University Chicago. Her work at the Provost's Office and the College of Arts and Sciences of Loyola University Chicago shaped her research focus on process analysis and budget operations. Dr. Galligar now serves as Director for Academic Business Operations at Seattle University. (galligar@seattleu.edu)

Agostino Menna earned his PhD from the University of Toronto. Currently he is a college professor at Niagara College in Niagara, Canada. He also is an adjunct professor at Niagara University in Lewiston, New York. (amenna@niagaracollege.ca)

Ramin Rahimy is an assistant professor in the Department of English Language and Graduate Studies, Isalmic Azad University at Tonekabon, Iran. He received his PhD in Teaching English as a Foreign Language (TEFL) from the Islamic Azad University at Khorasgan-Isfahan. He has authored several articles and presented conference papers related to translation and language studies in Iranian and international journals.

Dan Inbar is Professor at The Hebrew University in Jerusalem. He has previously served as the Dean of the College of Education at that institution. He has written extensively in the field of theory of planning and contributed regularly to *Educational Planning* where is on the Editorial Board. (msdinbar@mscc.huji.ac.il)

EDUCATIONAL PLANNING, POWER, AND IMPLEMENTATION: THE CONCEPT OF DEGREES OF FREEDOM[1]

DAN E. INBAR

There is a huge gap between the formulation of a plan and its implication. Often it is intensely difficult to bridge. Implementation is the Achilles' heel of educational planning. Even when a plan is rational, comprehensive, coherent and consistent, its implementation may well be partial, slow and inefficient. And the end result may even be inferior to what would have been expected in the absence of any plan (Waterson, 1965). This article attempts to establish a conceptual frame of reference which might serve as the basis for analysis, resulting in a series of systematic propositions about interconnections between the scope and content of plans, the power required for implementation and the implementation process itself.

The article rests on three basic assumptions about planning. The first is that it is a process. In the words of Dror (1963), a process for preparing a set of decisions on which future action is to be based. Since decisions effectively determine policy (Lasswell & Kaplan, 1965), planning involves the entire process of bringing about a particular course of action, and may be defined as the process consciously oriented toward future change of the present situation.

The second is that planning always implies change. Since it can be viewed as a process of authoritative reallocation of priorities, the opposition of some groups will be inevitable, as long as the decisions inherent in the plans involve changes perceived as affecting vested interests

The third is that social power may be defined as a system's ability to carry out a proposed change. Therefore the process of translating plans into action is conceived as a series of implementing decisions based on the exercise of social power. In other words, the concept social power will be used to provide the link between planning and implementation. The resulting operation concepts will assist in the implementation of the plan, in assessing the institutional capacity for its implementation, and finally in relating these variables to one another. The theoretical frame of reference is expressed in the following diagram:

Nature of the plan ⟷ Configuration of power recourses

Implementational Patterns
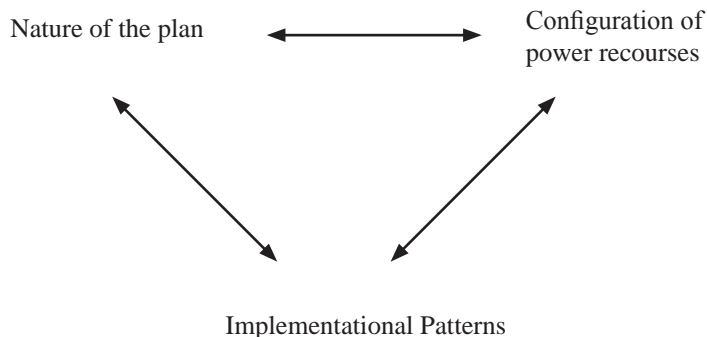
The arrows are two-way because planning and implementation are perceived as a continuous process, with feedback allowing for constant interplay among the different components. In such a situation the interesting questions, to which this paper is addressed, are: How will power affect, and be affected by, the implementation process? How is the concept of power translated into operational terms? How does the concept of power help increase our understanding of the implementational process?

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1   This article originally appeared in the May, 1975 edition of the journal and is reprinted as part of the celebration of the Society's 40th anniversary year.

PLANNING DEGREES OF FREEDOM

The concept of educational planning can be misleading if distinction is not made between its different forms. It is a generalized concept, which comprises different planning processes, and different tactical aims based on different forms of knowledge, all leading to the differential use of social power.

There is a common denominator underlying a structural reform of the education system, location of school sites, rezoning, curriculum-planning, educational innovation, and the introduction of educational technology. All are included within the provision of educational services and have the same general aim: improved education for the benefit of man and society. However, quite different planning processes are involved. One principal difference is the interrelationship of uncertainty, flexibility, plan-duration and scope.[2] Different types of plans have different degrees of uncertainty, and such implicit differences in uncertainty will influence plan flexibility. The degree of flexibility *explicitly* introduced into a plan must be proportionate to the degree of uncertainty about future events. The degree of *implicit* flexibility of the plan can be defined as the degree to which its nature and content (i.e., the characteristic of its unique set of decisions) are interrelated, so that reaching a decision determines the direction in which later decisions go.

As such interdependence increases, implicit flexibility determining the implementation process will decrease. We define the degree of explicit flexibility introduced into a plan as the degree to which feedback mechanisms are built into it, enabling choice to be made between alternative courses of decision and action during the implementation process. Obviously, explicit flexibility is limited. And, equally, it is related to the flexibility inherent in the nature of the plan. Consequently, different educational planning exercises imply enforcement through different implementation processes.

We shall distinguish among plans by utilizing the concept of degrees of freedom. A plan's degrees of freedom indicate its implicit possibilities (and their explicit working out) for choice and change of direction in implementation. It follows that the determination of the course of implementation will be a function of the degree of freedom of the plan. The selection of the time span and scope of planning activities is not arbitrary. It depends upon at least three major factors: The first is *volition,* the desire to accomplish certain aims in a determined time. One example would be accomplishing an educational reform in, say, ten years, based on some specific political and social desires. Another example would be increasing compulsory free education from eight to ten years within a desired number of years. The second is *conformity to realistic constraints.* There is the need for certain scope within given time-span boundaries, which are based on the implicit requirement of the plan content, or the natural cycle of the subject matter. For example, the schooling cycle will determine the minimum time-span limits of formal manpower development. Similarly, the learning process, and its evaluations will impose their own limits on the preparation of new tested instruction books. The third is the *ability to actualize objectives and requirements.* This will depend upon the economic and political power of the decision-maker.

The three main characteristics of the concept degrees of freedom might be summarized, then, as follows:

- The more complex the plan's issues, the wider the scope and time-span, the greater the change envisaged, the greater the degree of freedom.
- The more parameters and coefficients are determined (derived from knowledge about inner constraints or from concomitant policy constraints), the more the degree of freedom decreases.

In other words it is possible to define degrees of freedom as the function of the number of determined parameters, ratio-coefficients, and constraints inherent or attached to the plan, relative to the number of components comprising a source of variation. In mathematical presentation:

$$d \times f = f\left(\sum_{i=1}^{n} X_i \Big/ \sum_{j=1}^{n} Y_j\right)$$

where: $X_i =$ number of known parameters (the sum of X can be seen as the "state of constraints and knowledge").

$Y_j =$ number of components (the sum of Y can be seen as the "state of variation").

The concept of degrees of freedom offered here provides a common denominator for educational plans and at the same time reflects their content and scope. It is true that it is difficult empirically to measure the degree of freedom, but the concept enables us to categorize plans according to the range of alternative decisions available during the process of implementation. The concept of degrees of freedom refers more to a characterization of a plan than to a definition of measurement. When proper account is taken of the stage of knowledge embodied in the plan, the range of alternative decisions that can be taken becomes clearer precisely because of the knowledge acquired about the types of choices possible during implementation.

In order to reach basic conclusions about the values to be attached to the degrees of freedom of different plans, we shall describe and illustrate a classificatory model which is based on the distinction between two principal categories of "technological" or "social" plans, and their formal and informal aspects. Obviously, none of the concepts is exclusive; often they are determined simultaneously.
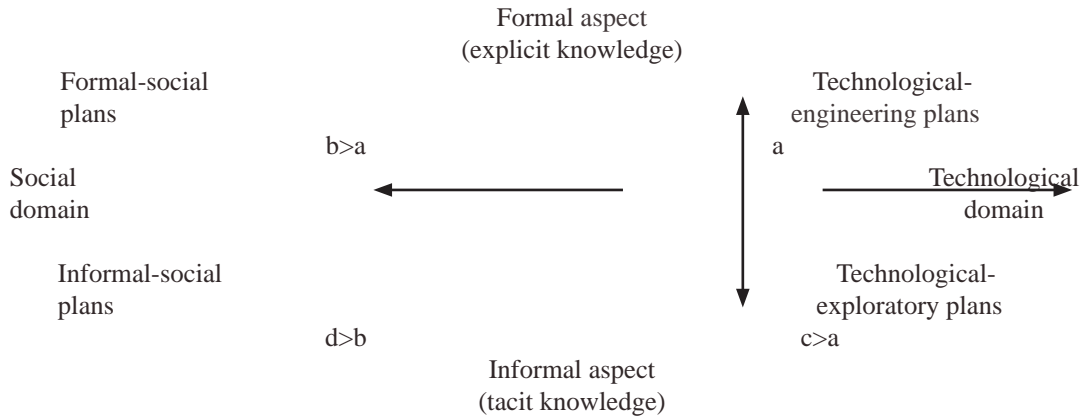
CLASSIFICATIONAL COORDINATES:
SOCIAL AND TECHNOLOGICAL, FORMAL AND INFORMAL

The concept "technology" is used in its broadest sense to indicate a rational approach, i.e. it utilizes means to achieve tangible objectives. Plans will be considered technological when they are governed mainly by technological, not behavioristic or social, constraints. In this context, the prepared set of decisions is the product of a logical process, based on scientific laws that derive from the specific subject matter (content) treated in the plan. Such plans will be appraised mainly from the point of view of their technological soundness.[3] Technological plans include such items as the construction of educational television or planning the physical plant of schools. Socially-oriented plans differ from technological ones in that they deal with human rather than inanimate "materials." This distinction is often used in discussions on organization. Organizations are viewed as being of two major types: production and service. The latter are "confronted with problems of establishing social relations with the 'object' of their endeavors and of having to motivate them in various ways" (Blau & Scott, 1962, p. 41-42). Thus the plans deal with social reciprocal relations either at an individual or group level.

The second coordinate deals with the formal and informal aspects of the plan's content. The formal aspects may consist of well-formulated sets of decisions which can be translated into operational terms. However, any activity has its informal and unformulated aspect. Furthermore, planning exercises will themselves encourage the creation of informal organizations. The effects of plans on the informal activities are far less predictable than the effects on formal activities. Knowledge is always fragmentary of consequences of social activities so that, in terms of Simon's treatment of the principle of bounded rationality, imagination must supply the lack of experience. "Personal knowledge" or "tacit knowledge" expands the treatment of planning beyond the purely rational limits. As Polanyi (1958) put it, personal knowledge is a mental effort with a heuristic effect, an unconscious process of trial and error through which the way to success is found; a continuous improvement process might be developed without it being specifically known how it was done.

Any system of symbols and operations can be functional only with its informal complementaries which are based on personal characteristics, accumulations of personal experience and proficiency. By definition, 'personal knowledge' is idiosyncratic and therefore difficult to analyze, and to determine its exact place and weight in the process of planning. However, as Dror (1968) has pointed out, the importance of extra-rational processes in either actual or optimal-decision-making and policy-making should not be underestimated.

Combining the four coordinates yields the following classification (through strict maintenance of the plan's scope, an ordinal scale of degrees of freedom can be attached):

Formal aspect
(explicit knowledge)

Formal-social
plans

Technological-
engineering plans

b>a
a

Social
domain

Technological
domain

Informal-social
plans

Technological-
exploratory plans

d>b
c>a

Informal aspect
(tacit knowledge)

where: a, b, c, and d represent values of degrees of freedom;
        a = relative low degrees of freedom.

Technological-Engineering Plans are of an essentially technological nature, based on past experience and scientific knowledge. There is a relatively high degree of certainty about the various parameters and the relationship between them. The plan's objectives tend to be well defined in operational terms, and in many cases are supported by mathematical models and calculations. The degrees of freedom of such plans are relatively low.

Technological-Exploratory Plans are essentially technological, but based upon further needed research and exploration. Consequently, their future horizon involves relatively high uncertainty, depending upon the degree of scientific exploration. Plans for the creation of new technological research centers, plans to develop new teaching machines, plans for effective utilization of technology in education, are examples of this type.

Formal-Social Category Plans occupy a social domain; basically they connect with the social structure. Their objectives tend to be quite formalized, and often depend upon mathematical and econometric models (Correa, 1969). Manpower plans, based on a mathematical equation linking manpower to various variables, exemplify them. One instance would be Tinbergen's regression equation linking second-and third-level manpower to GNP.[4] A recent study of skilled-man power-demand projection for an irrigation project in Mexico was based on a regression equation linking the various levels of agricultural-professional manpower to the development of the irrigated area measured by hectares (Haissman, 1970). However, Haissman was dealing with a social-production process, so the uncertainties are relatively high. For example, the problem of forecasting the productivity of labor is a difficult one which has yet to be solved. Future technology changes as well as various social and economic changes might effect the basic assumptions about productivity. Consequently, such uncertainties have to be matched by flexibility explicitly built into the plan. R.G. Hollister, in his evaluation of the Mediterranean Regional Project, remarked, "Educational strategy should be formulated with the uncertainties engendered by technological change clearly in mind" (Hollister, 1966, p. 62).

Other plans in this category are oriented primarily toward the formal aspects of the social system, that is, toward structural reform. An example is the recent educational reform in Israel, where the plan's objective is to change the structure of the educational system from an 8:4 grade structure to a 6:6 structure (Inbar, 1974). In most of such plans the explicit planned changes are quantitative in nature, but they are undoubtedly made with the hope that they will have a qualitative impact.

Informal-Social Plans also occupy a social domain but they connect with its informal structure. Generally they are set out rather vaguely. The effectiveness of new instructional methods or the introduction of new technology depends upon appropriate behavioral changes in its users. Plans for effecting such a behavioral change in teachers' attitudes, or for creating the right conditions for social change to occur, fall in the informal-social category. An increase in the number of teachers, a change in the teacher-pupil ratio

- these are formal objectives. However, the increase depends upon the recruitment of teachers which in turn involves a number of informal-social variables. One, for example, might be that if large numbers of qualified persons are to be attracted into the teaching profession then teachers should be awarded higher status.

An overall development plan with the aim of "nation building" offers an example of a more comprehensive informal-social plan. The objectives of the Tanganyika Five-year Development Plan are (a) to build a sense of national identity, (b) establish a base of consensus among the different nations of a possible future Tanzania, and (c) define the best means of achieving this. The three-year development plan and the five-year plan both reflect a systematic attempt to keep campaign promises concerning independence. However, they cannot be realized without important changes in human behavioral, loyalties, and beliefs (Burke, 1965).

The radio clubs in Niger also exemplify such "nation building". Their general aim was to "cultivate democratic practices in the villages, to create a body of well-trained leaders . . . to contribute to the educational improvement and the culture of radio listeners" (UNESCO IIEP, 1967a, 1967b). In this case, the rather vague general aims of the plan were translated into a unique and well-defined procedure; the plan thereby acquired a much-increased feasibility. However, the relatively high degree of freedom inherent in such informal-social plans is reflected in the flexible organization and management of the radio clubs.

SOCIAL POWER AND IMPLEMENTATION

One can now formulate the main assumption underlying this paper: different plans, according to their differential degrees of freedom, will be translated variously into action, and will require varying degrees and types of social power for their implementation. The power required for implementation will be a function of the plan's degree of freedom.

Or: $$\text{Power} = f\,(\text{d.f.})$$

The concept of power is one of the most fundamental in political science. As Lasswell put it, "The political process is the shaping, distribution, and exercise of power" (1959, p. 75). Here the discussion of social power will be confined to its implications for planning implementation. We shall disregard the moral question of planning change, and the use and legitimization of power. Nor shall we provide a comprehensive analysis of the various conceptions of power developed through history.

The central place of power in the social arena has produced a huge literature on power and its role. Nevertheless, few concepts are more perplexing. Dahl (1957) notes that scientists have not yet formulated a concept of power rigorous enough to be used in systematic study. Russell (1938) treats power as a property which can belong to a person or group. Tawney (1931) defines it mainly as capacity; Parsons (1954) as the realistic capacity of a system-unit to actualize it's interests. Weber (as cited in Gerth & Mills, 1946), from a socio-political angle, treats it as the opportunity to realize actions even against the resistance of others. Lasswell and Kaplan (1965), by emphasizing ability and process, develop definitions which treat power as a special case of the exercise of influence, Bierstedt (1950) and Wolf (1959) view it as the ability, actual or potential, to direct, or influence, forces toward change in a given direction. Cartwright (1959), defining power from a psychological point of view, sees it as the ability to perform acts which activate forces in the life space of others.

All these definitions appear to refer to the same type of social phenomena - the process of influence or control over behavior. Power itself seems to be the predisposition which makes behavioral change possible, the ability to induce acceptance rather than the actual inducement. In terms of plan implementation, for all practical purposes, the relationship between the actual exercise of power (by whatever means) and the differential degrees of effectiveness, is one of the crucial problems in analyzing the process.

Social power is a property of social relationships. From this point of view, Emerson (1962) developed the theory of the power-dependence relationship, and analyzed social relations as a process which commonly entails ties of mutual dependence between the parties. Power interactions imply exchange relationships. As long ago as the 1930s, Harold D. Lasswell wrote that implicit in power is the notion of exchange of goods and services of peoples and communications, and the interaction between political symbols and practices. And later he wrote, more explicitly, "The power relation is give-and-take; or to give a more dynamic twist to the words, it is giving-and-taking. It is cue-giving and cue-taking in a continuing spiral of interaction"

(Lasswell, p.62, p. 10). In a similar vein, Mannheim (1950, p. 49) wrote, "Interaction in power relations is not based on fear alone but on mutual response, which is perhaps the more fundamental and general source of human control". In other words, since we defined power as the ability to *induce* acceptance, and the *amount* of power that creates this ability as the potential amount of resistance to be overcome, it is now possible to express the amount of power needed for implementation as the intensity and type of opposition potentially to be overcome. *That* is *to say, the power for implementation* is *correlated positively to the potential intensity of the opposition to implementation.*

Social power, as a property of social relationships, is essentially a reciprocal relationship of exchange of resources. Resources of power might be seen as capacities of a person, group, or organization which can be made available to others for the satisfaction of their needs or the attainment of their goals. From the power-holder's point of view, power resources are the means by which he can increase the probability of acceptance of his policies. Power resources may be tangible or intangible. In spite of the instrumental nature of resources, they will not be treated as though valued for themselves, but rather as means to achieve certain ends, in this context, to ensure plan implementation.

Here we make use of French and Raven's (1959) classification of power bases - reward, coercion, reference, legitimacy and expertise. We shall also use Bennis's (1966) classification of value power in the analysis of eight basic approaches to the use of power which is shown in Figure 1. There are, of course, many other approaches which might have served our purpose. For example, Gross's (1967) analysis of activation mix, Bicanic's (1967) classification of eight disciplinary elements of planning, or Parson's (1969) paradigm of social action.

PATTERNS OF IMPLEMENTATION

None of the power resources is a sufficient condition to ensure the implementation of plans. The resources of social power are not mutually exclusive. Interaction of the resources will tend to function in ways not inherent in their composition. The objective is to configure the power resources in such a way as to match the type of plan and change dealt with under certain conditions, and consequently to increase the probability of success in implementation. The problem is how much, of what resources, and when they are to be used. Therefore an analysis must be made of some basic configurations of resource employment in which different resources dominate. Each configuration will suggest a unique pattern of implementation.

We define patterns of implementation as arrangements of social actions, in a given social space and time, directed at creating the appropriate circumstances to enable the plan to be put into action. Such patterns are based on a relatively uniform series of activities. While there may be variation within the series, so that the implementation pattern differs from the ideal type, some activity characteristics dominating the pattern can be expected. In treating problems of power employment, Mannheim coined the term "social techniques" to refer "to all methods of influencing human behavior so that it fits into the prevailing patterns of social interaction and organization" (1950, p 6).

Institutionalized discipline. Technological-engineering plans imply the interdependence of performance actions with a well-organized course of action. There is need for a defined role network and a developed control system that will ensure coordinated operation. Activation of people along a direct course of action rests implicitly or explicitly on contractual relationships backed by formal sanctions. Essentially, we are dealing with a wide range of institutionalized discipline. Well-formulized plans enable rewards and sanction to be attached to defined actions. To the degree that objectives are clear and operationally defined, it becomes easier to adjust specific rewards and sanctions to each operation (March and Simon, 1958). The use of pure force, the application of (or threat of) physical means are only the extremes of the various methods of coercive compliance. Although coercion is one of the power sources, other resources can be used coercively. Legislation to impose a plan, making its implementation compulsory, is the most common method of achieving desired behavior, as can be seen in educational planning (Inbar, 1973).

Viewing institutionalized discipline from a different angle, we might consider it a means of coping with uncertainty. It reduces uncertainty by minimizing the uncertainties that derive from unpredictable future behavior. Such reduction, however, is directly related to the degree of knowledge about the desired future course of action.

Figure 1. Analysis of eight basic approaches to the use of power

Approach Angle / Power Resources	Forms of power exercise (Manheim)	Types of planning exercises (Cohen)	Influential power employment (Russell)	Means of control (Etzioni)	Control technique (Dahl and Lindblom)	Measure of performance (Churchman)	Types of investment (Ilchman and Uphoff)	Psychological correlates (Kelman)
Coercion	"Domination" (direct commands)	"Coercive" (direct power)	"Physical" (direct body threat)	"Coercive" (physical means)	"Command" (penalty virtue) / Unilateral		"Stability" (coercion and threat)	"Conformity" (hoping for favorable and avoiding unfavorable action)
Goods and Services	"Manipulation" (indirect influence)	(enlightened self interest) / indicative	"Sanctions" (rewards and punishment)	"Utilitarian" (material means)	"Manipulated control" / Reciprocal (manipulation of means other than command)	"Persuasion" (selling the plan)	"Legitimacy" (legitimizing the use of power)	
Authority								
Status		"Educative" adult education	"Propaganda" (opinion influence)			"Politics" (redistribution of power structure)		"Identification" (based on attractiveness & self-satisfaction)
Information					"Spontaneous control" (unintended influence)	"Mutual education" (teaching the plan)		
Values				"Normative" (symbolic means)			"Solidarity" (emotional commitment)	"Internalization" (intrinsic rewards)

Professional authority. The implementation of explorative-technology plans, which depend on a high degree of professionalization for exploring new fields and coping with complicated operations, requires expertise and responsibility. Such professionally responsible decisions are based on the recognition, or acceptance, of the fact that the expert possesses the superior knowledge needed to cope with uncertainties inherent in their domain. In other words professional authority is the base for implemental compliance. This expertise is based on experience, training, knowledge, intuition, creativity, and related attributes. It is characterized by personal or tacit knowledge. The

Figure 1. Analysis of eight basic approaches to the use of power

application of such knowledge is an individual act that cannot be transferred from one person to another by decree.

Manipulative persuasion. Formal-social plans are oriented toward organizational, structural, or quantifiable social changes. They have a definite basis and a clear outline; they have definite objectives, and their implementation guidelines have been determined beforehand. But since we are operating within the social sphere, where the process of plan implementation relies heavily upon continuous application of human judgment, the behavioral changes needed to

match desired structural changes are far less determinable. Consequently, we might expect increasing uncertainties deriving from the low predictability of success in changing complex human behavior. Hence the need to develop in individuals and groups the awareness that their own self-interest is involved in the implementation of the plan. As long as the formulated objects of the plans are taken for granted, other implementation measures are needed in order to follow the predetermined implementation steps. Such implementation measures might be termed manipulative persuasion.

Manipulation essentially is the substitution of judgment in such a manner that those being influenced are not aware that it is happening - at least not while it is taking place. Persuasion is the display of judgment in such a way that those exposed to it have the opportunity to become aware of the potential value of accepting the judgment in place of their own opinion (Gilman, 1962). Manipulative persuasion can be defined as an intentional process of increasing awareness of selective values and sanctions inherent (or implied) in the process of planning, which parallel or overlap the vested interests of those exposed to it and upon whom implementation depends. Undoubtedly, the power configuration of this pattern will consist of all types of power resources, but the dominant ones include authority, the manipulation of goods, services and the flow of information, all of them playing a persuasive role with authority as the regulative balance.

Re-Education. Goals and objectives of informal-social plans are mainly defined in qualitative terms. Since the main concern is with informal and behavioral aspects, implementation is highly affected by attitudes, norms and values. Furthermore, in considering the relationship of internal values to external behavior, the main problem in social planning is to relate changes of behavior to changes of values in order to avoid change which is merely symbolic or ritual (Ashford, 1965). The main component of re-education is participation and involvement. Since educational planning requires the participation of an ever-increasing number of key individuals and organizations (teachers unions, parents, principals, superintendents and students) the plan's re-education framework must be based on the requirements of participation as a necessary condition for implementation.[5] Usually, the various patterns of implementation can be generated on a continuum from coercion to consensus, with the power variable. The level of degrees of freedom in planning, the configuration of power resources is summarized in Figure 2.
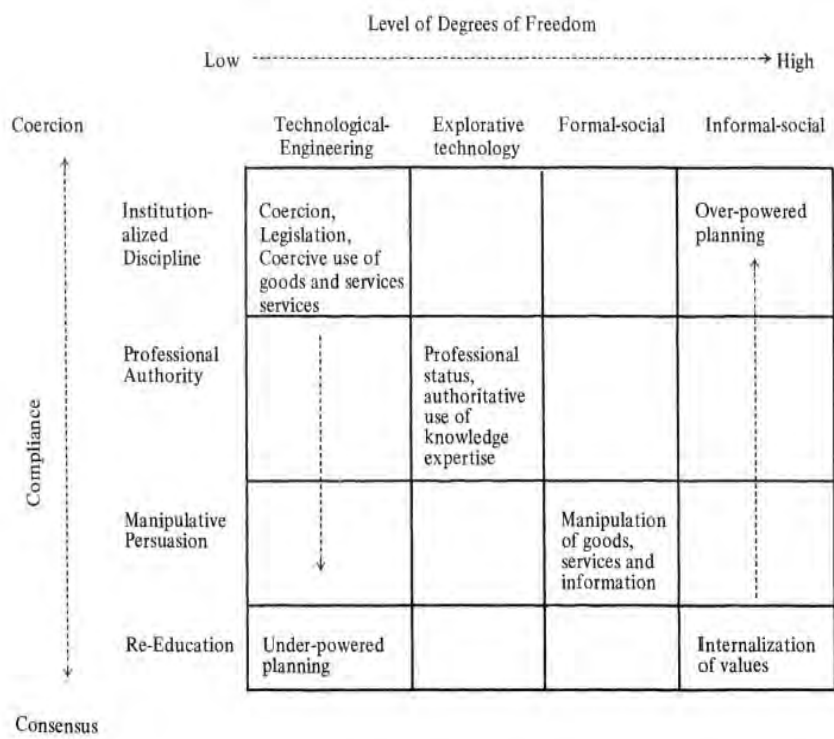
Figure 2. Educational Planning, Degrees of Freedom and Implementation Patterns

It is obvious that there is no *one right way* for the execution of planning exercises. But, equally, there is not unlimited space for maneuvering. The very nature of a plan assumes certain limits to the implementational patterns. Since any planning exercise incorporates all types of domains, knowledge and degrees of formality, the questions which must be answered are "What are the plan's dominant aspects? What is its basic profile?" Furthermore, if the success of the whole planning-implementation process depends upon the realization of all of its parts, then those parts characterized by greater degrees of freedom will tend to be the "critical path" of the whole plan. In this case "critical path" is not mainly determined by time but by levels of uncertainty.

ENDNOTES

[1] D. W. Ewing (1969), points out that, from a psychological point of view, "Probably the most universal difficulty arises from people's fears of planned change ... they resist being changed by other people, e.g., planners". *The Human Side of Planning.* New York: Macmillan Co., p. 44. See also the bearing of educational planning on social tension discussed in our article "The Educational Planning System: Change and Tension", *Futures,* April 1975, pp. 119-128.

[2] Friedman in his introduction to Vol. XI no. 3, 1959, of the *International Social Science Journal* (pp. 327-329), lists five principles that result from the unalterable basic planning condition of uncertainty about the future: time limitation on projections, the necessity of continuing planning, the use of expectation calculus about the future, the adoption of a framework for planning, and the necessity for careful consideration of flexibility in planning. Future uncertainty is also treated by Herbert Simon (1957), as a major element in his principle of "bounded rationality". See *Models of Man.* New York: John Wiley, pp. 80-83 and also J. G. March and H.A. Simon (1958), *Organization.* New York: John Wiley & Sons, pp. 203-210.

[3] See for example "The Technical Aspects of Project Appraisal" in J. A. King (1967), *Economic Development Projects and Their Appraisal: Cases and Principles from the Experience of the World Bank.* Baltimore: Johns Hopkins Press, p. 8.

[4] Netherlands Economic Institute (1966). For a manpower plan based on this equation, see *Report of the Indian Education Commission* (1964-66): *Education and National Development*, (1966). Delhi: Ministry of Education.

[5] See R. W. Smith (1973), "A Theoretical Basis for Participatory Planning," *Policy Science, 4* (3), 275-296.

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THE TEACHING CAPACITY MODEL: A TOOL FOR STRATEGIC PLANNING IN HIGHER EDUCATION

Paul E. Gabriel
Di Di B. Galligar

ABSTRACT

This paper illustrates a practical approach to resource planning in higher education. The Teaching Capacity Model (TCM) applies a well-known economic tool to quantify the relevant opportunity costs facing a research university when it considers strategic policies designed to enhance the undergraduate educational experience. Two possible strategies considered in this paper are (a) increasing the number of full-time tenure-track faculty engaged in undergraduate teaching or (b) reducing the average undergraduate course size. Using hypothetical data for a mid-sized research university, the TCM clearly presents the implications of these strategies in terms of: (a) the reallocation of faculty from graduate programs, (b) the need for increased faculty productivity (teaching loads), and (c) the additional full-time faculty resources required.

INTRODUCTION

Perhaps the most serious contemporary challenge facing higher education in the United States is how to provide adequate institutional support for intellectual inquiry at the graduate and undergraduate levels. Many colleges and universities, both public and private, are now confronted with a two-fold dilemma: declining financial resources combined with escalating costs. When one considers the combined effects of recent upheavals in financial markets, a severe economic recession, stagnant demographic trends in the college-age population, and the reduction in public and private funding for higher education, it is not surprising to find a certain level of pessimism in the professional academic literature. Faced with limited options, institutions typically respond to budgetary pressures with a combination of revenue enhancement policies such as increasing tuition and fees and cost-containment strategies such as increasing class sizes or cutting programs and personnel. The former increases the financial burden for students and families while the latter often erodes the quality of the educational experience.

In addition to the financial difficulties facing American higher education, there is an upsurge in public scrutiny for better accountability in the educational outcomes of colleges and universities. This is especially true for undergraduate education at public universities. For example, a recent comprehensive study by two former college presidents is highly critical of U.S. public educational outcomes, especially as measured by 4-year graduation rates for undergraduate students (Bowen, Chingos, & McPherson, 2009). This study confirms and reinforces what higher education experts have known for at least 20 years: a typical publicly-supported university in the U.S. graduates less than half of its first-year students within 4-years, and barely two-thirds within 6-years. Although graduation rates vary by institutional characteristics, it is not unusual for a public university to graduate less than one-third of its entering class four years later (Planty, et al., 2009). These relatively poor student outcomes at public universities have led some analysts to question the viability of public undergraduate education in general (Bowen, et al., 2009; Sperber, 2000). One possible suggestion to improve graduation rates for public universities is that they become more like their private liberal arts counterparts by offering smaller undergraduate class sizes and increasing the use of full-time, tenure-track faculty in undergraduate and core courses. An interesting example of this strategy is the recent growth of "Honors Colleges" at many large public universities. By their nature, these programs provide an enriched educational experience that emphasizes critical thinking, creativity, and written expression through seminar-type courses taught by seasoned, full-time faculty. Although such strategies are easy to propose, actual implementation is another story.

According to Facione (2009), it is now imperative for the higher education industry to engage in a more serious analysis of the delicate balancing act between academic mission and available resources, especially in this tough economic climate. Many will agree that in order to achieve this balance, it is critical for institutions to protect their main revenue streams, and for most this means the retention of full-time undergraduate students. For research universities with unstable financial health, this focus may come with the difficulty of re-distributing faculty teaching loads. In the last 40 years, higher education went

through the deliberate move from an undergraduate to graduate/research model (Sperber, 2000). The basis of this shift was to provide graduate students with new and more in-depth knowledge from research-active faculty members. In addition, there is a popular opinion among academics that the graduate-research model greatly facilitates faculty scholarship (Bowen, et al., 2009; Sperber, 2000). As a result, it is not unusual to see full-time, tenure-stream faculty members assigned to only graduate-level courses, consequently pulling them away from teaching at least one undergraduate section. In these tough times, however, it has become evident that many universities are strengthening their emphasis on a stronger undergraduate education by eliminating graduate studies that are not academically strong and re-examining faculty teaching loads. While it is difficult to go through this process, academic administrators may need to consider that faculty scholarship should not be the primary justification in the allocation of full-time faculty members to graduate courses (Facione, 2009).

This paper develops a basic model to illustrates the trade-offs, or opportunity costs, for an institution that attempts to reallocate faculty resources to enhance the educational experience of its undergraduates. The basic premise is that the university is considering a change in strategic direction; one that places a greater emphasis on providing a strong undergraduate curriculum. In the model presented below, the opportunity cost of devoting more attention to undergraduate programs will be measured by the sacrifices (reductions) in graduate programs that must occur, if the university's overall instructional resources are held constant. The model's results are illustrated using a practical example with hypothetical data for a medium-sized research university. We assume that our hypothetical university is fully engaged in providing graduate-level education, along with extensive undergraduate programs. As an example, assume a university classified as "RU/H"-- Research Universities (high research activity) by the Carnegie Foundation.

Basic Teaching Capacity Model (TCM)

A modern research university is a complex institution that must somehow reach a balance between a myriad of competing missions (e.g., basic and applied research, graduate and undergraduate instruction, service to the community) with a wide, albeit finite, array of human and physical resources. For the purposes of this paper, we will narrow our focus to a single, yet important, mission: full-time student instruction. Similarly, we consider the allocation decisions for a single instructional resource: full-time, tenure-track faculty (FT-TT), that is, faculty who are either tenured or tenure-eligible. Thus, for simplicity, we are not directly including other faculty categories (e.g., full-time, non-tenure track -- also referred to as "contract" faculty; part-time (adjunct) faculty and graduate teaching instructors). Also for simplicity, we ignore specific divisions within a university (colleges and departments), and assume that all students attend full time.

A university must offer an adequate number of courses to meet the academic needs of its students. This number is based on many factors such as enrollment levels, student course loads, class sizes, and curricular needs. For simplicity, we will ignore curricular issues and other factors, and combine all courses into one aggregate measure: the overall number of classes needed per year (#CLASSES NEEDED). It is possible to express the fundamental instructional allocation problem for a university, in terms of annual number of classes, as the following equation:

$$\#CLASSES\ NEEDED = \frac{\left(\#STUDENTS \times AVE.\ COURSES\ PER\ STUDENT\right)}{AVE.\ CLASS\ SIZE}$$

(1)

Expression (1) shows explicitly the well-known outcome that class offerings are directly related to enrollment and average student course load, and indirectly related to the average enrollment per course (Massy and Zemsky, 1997).

The university's ability to meet the demand for courses specified in (1) is primarily determined by its endowment of instructional human resources, i.e., full- and part-time faculty.

Given that we assume one type of faculty resource (FT-TT faculty), the teaching capacity can be depicted as:

$$\overline{TC} = N \times \overline{CPF} \qquad \text{(2)}$$

where $\overline{TC}$ = annual teaching capacity (number of courses)

N = number of FT-TT faculty

$\overline{CPF}$ = average number of courses taught per faculty

(i.e., annual teaching load)

Given $\overline{TC}$ from expression (2), the university must allocate its annual teaching capacity among graduate (G) and undergraduate (UG) courses as follows:

$$TC = G + UG \qquad \text{(3)}$$

Or, equivalently,

$$UG = \overline{TC} - G \qquad \text{(4)}$$

Expression (4) forms the basis of our Teaching Capacity Model (TCM), and shows the competing relationship between graduate and undergraduate course offerings with a given (fixed) level of faculty: e.g., more graduate classes taught (G) mean fewer undergraduate courses covered by the full-time faculty. The allocation problem facing the university, as given by the TCM, can also be illustrated with a diagram. Figure 1 illustrates teaching capacity as distributed among graduate and undergraduate classes. Each point along the TCM shows a possible mix of graduate and undergraduate classes that can be accommodated with the current faculty size and average teaching load. This graph applies the well-known Production Possibilities Frontier from economics to illustrate class allocation choices for the university (Mankiw, 2008).

Figure 1: The Basic Teaching Capacity Model

Undergraduate

$\overline{TC}$

Teaching Capacity Model:

$$UG = \overline{TC} - G$$

Graduate

$\overline{TC}$
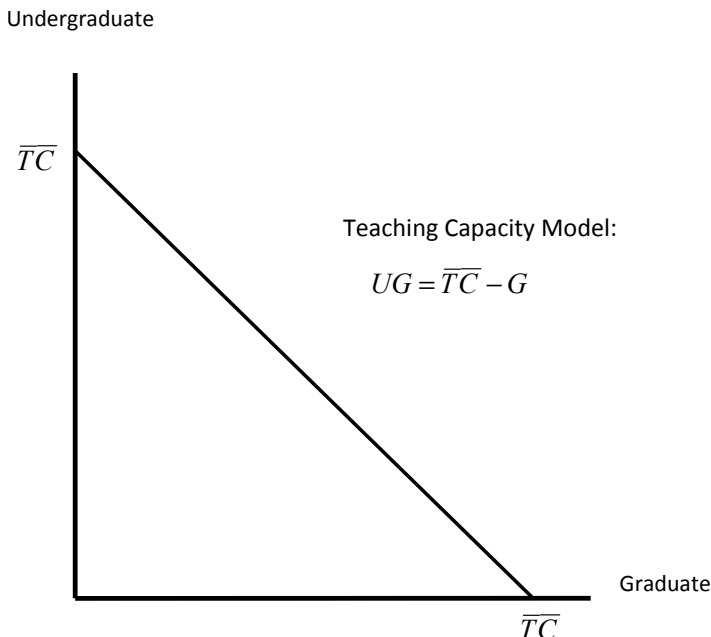
TCM with Hypothetical University Data

Borrowing terminology from Bowen, et al., (2009), suppose we are considering a medium-sized, research university with mid-level selectivity, or, in the words of Sperber (2000), a "Big-time U." The university has the following basic characteristics:

- 9000 full-time undergraduate students (0 part-time)
    - The average student takes 10 "lecture" classes per year
    - The average class size = 50 students
- 1000 full-time graduate students (includes doctoral and masters)
    - The average student takes 5 "lecture/seminar" classes per year
    - The average class size = 10 students
- 250 FT-TT faculty
    - The average faculty member teaches 4 courses per year

Given the data above, the university needs to provide instruction for 10,000 students with 250 FT-TT faculty (along with other instructional staff). From Expression (1), we see that our university requires 1800 undergraduate lecture courses ((9000 x 10) ∕ 50) and 500 graduate lecture/seminar courses ((1000 x 5) ∕ 10) to be offered each year, or a total of 2300 classes. Given a FT-TT faculty of 250, with 4 classes taught per faculty member per year, the FT-TT teaching capacity is 1000 courses, according to expression (2). If 100% of graduate courses are taught by FT-TT faculty, 500 undergraduate lecture courses (28% of 1800) can also be covered by FT-TT faculty, with the remaining 72% (1300 classes) taught by adjuncts, contract faculty, and graduate students. These percentages are consistent with results reported elsewhere for public universities (Schibik & Harrington, 2004; Sperber, 2000).

Point A in Figure 2 illustrates the initial teaching allocation for our hypothetical university: 500 undergraduate classes and 500 graduate classes taught by FT-TT faculty. At first glance, the implicit trade-off between undergraduate and graduate classes appears to be one-to-one – i.e., if one faculty member is removed from an undergraduate class, he/she is available to teach one more graduate seminar. Yet, from a productivity standpoint (e.g., student credit-hours), the opportunity cost of a graduate class is five-times more than an undergraduate class. That is, student credit hours for 50 undergraduate students must be "sacrificed" to teach 10 additional graduate students. In financial terms, graduate classes are even more expensive relative to undergraduate courses because of graduate stipends and tuition benefits. Figure 2 also indicates that if every FT-TT faculty member was engaged in undergraduate teaching (point B), to the exclusion of all graduate classes, there are 800 undergraduate classes (44%) that still need to be covered by part-time and/or contract faculty. Figure 2: TCM for Hypothetcal University
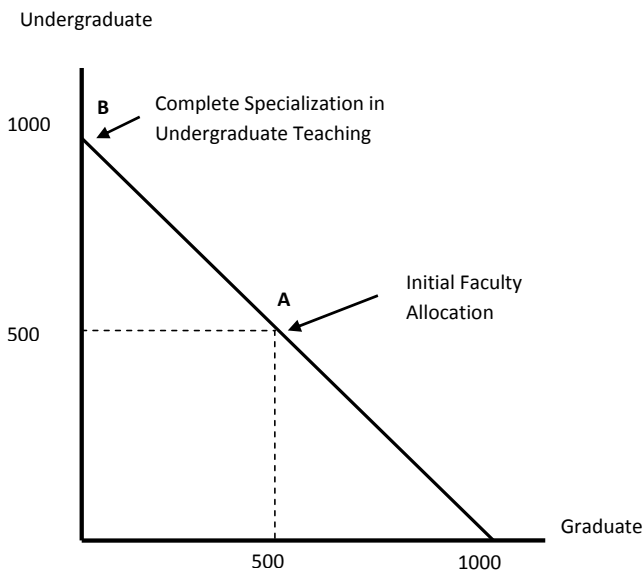
The TCM model can also be used to illustrate the implications of a strategic change of direction for the university. For instance, suppose the university's goal is to improve the overall undergraduate experience by reducing student attrition and increasing the 4-year graduation rate. In addition, assume that a consensus has been reached that this goal might be accomplished by having a greater percentage of undergraduates taught by full-time, tenure-track faculty, especially in lower-division core academic courses. If no additional resources are available (i.e., new faculty lines), achieving this goal has obvious consequences: either diverting faculty resources from graduate education, or somehow increasing faculty productivity. These outcomes can be presented easily with the TCM using the hypothetical university data.

To illustrate, suppose the university's new target for the percentage of undergraduate courses covered by FT-TT faculty is 35%, with no change in the average undergraduate class size or number of faculty. At first glance, this appears a modest goal, especially by private college standards. However, many public research universities would be hard pressed to meet this number (see Sperber 2000, pp. 78-80). This goal requires that 630 classes (35% of 1800) be taught by FT-TT faculty, an increase of 130 classes, and is shown in Figure 3 as the movement from point C to D along the TCM. If graduate instruction is restricted to FT-TT faculty, eliminating 130 courses from graduate programs requires that the number of graduate students (in terms of student capacity) be reduced by 260, a decrease of 26%, assuming stagnant resources.[1]

Figure 3: Shifting Faculty Resources to Undergraduate Classes
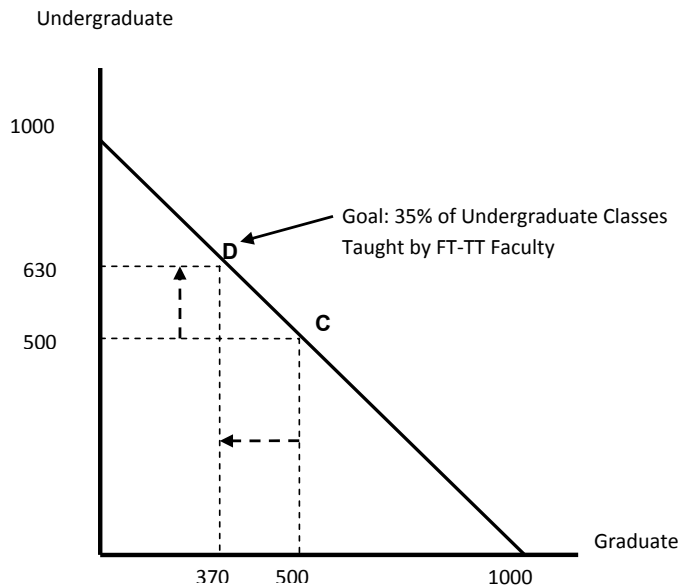
If it is not politically possible to cut graduate programs at the university, then achieving the 35% undergraduate coverage rate can be accomplished by two alternatives: (a) additional FT-TT lines, or (b) increasing the average teaching load per faculty member (or some blend of the two). Figure 4 depicts, that an additional 130 undergraduate classes can be covered without sacrificing graduate programs, if the TCM shifts to the right (from TCM_1 to TCM_2). This rightward shift is possible if one of the following occur: an increase in FT-TT lines by 33 (to 283) or the average faculty teaching load increases from 4 to 4.5 classes, that is, approximately half of the faculty must teach one additional course per year.[2] In economic terms, the goal is reached if faculty resources are added, or existing resources become more productiveFigure 4: An Increase in Faculty Resources or Productivity

Figure 4: An Increase in Faculty Resources or Productivity
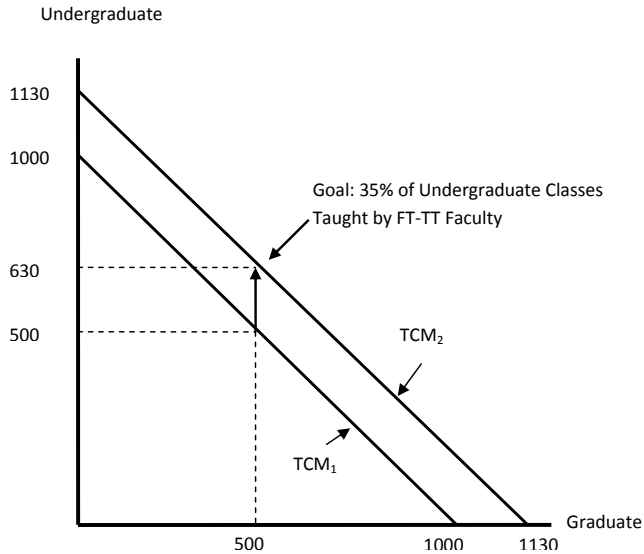
The TCM can also illustrate another potential strategy to improve undergraduate education: a decrease in the average class size. Given the basic institutional data above, we can determine the effects of reducing the average undergraduate class size to, say, 40 students (from 50). To implement this strategy, expression (1) indicates that 2250 undergraduate classes are needed per year, an increase of 450. If faculty resources, productivity (teaching loads), and graduate course offerings remain unchanged, the FT-TT coverage of undergraduate classes would consequently decline from 27.8% to 22.2% (i.e., 500/2250). Since the additional classes must be covered, with adjunct and/or contract faculty, the net outcome for undergraduate educational quality is uncertain (Schibik & Harrington, 2004). If the university wishes to maintain FT-TT coverage at 27.8%, then 625 undergraduate classes must be taught by this group (27.8% of the 2250 smaller-sized undergraduate classes). As shown in Figure 5, this objective is met if 125 fewer graduate classes are offered (i.e., moving from point E to point F). On the other hand, if each faculty member taught 4.5 classes per year (an increase of 0.5), the TCM would shift outward (from TCM_1 to TCM_2 in Figure 5), allowing 625 undergraduate classes to be taught without sacrificing graduate courses. Alternatively, moving from TCM_1 to TCM_2 could be accomplished if approximately 31 new FT-TT faculty are added, while maintaining the same number of graduate courses and faculty teaching loads.[3]

The similarity in outcomes for the FT-TT coverage and class size scenarios is not surprising. In the first scenario, the proposed faculty allocation to undergraduate education was increased by approximately 26%; in the second scenario, average undergraduate class sizes were reduced by 25%. Both of these scenarios require one, or a combination of, the following: more faculty resources, higher faculty productivity, or a reallocation of faculty resources from graduate teaching. The TCM clearly quantifies the relevant opportunity costs for university administrators when they attempt to implement a reallocation of instructional resources.

Figure 5: Reducing the Average Class Size for Undergraduates

Figure 5: Reducing the Average Class Size for Undergraduates
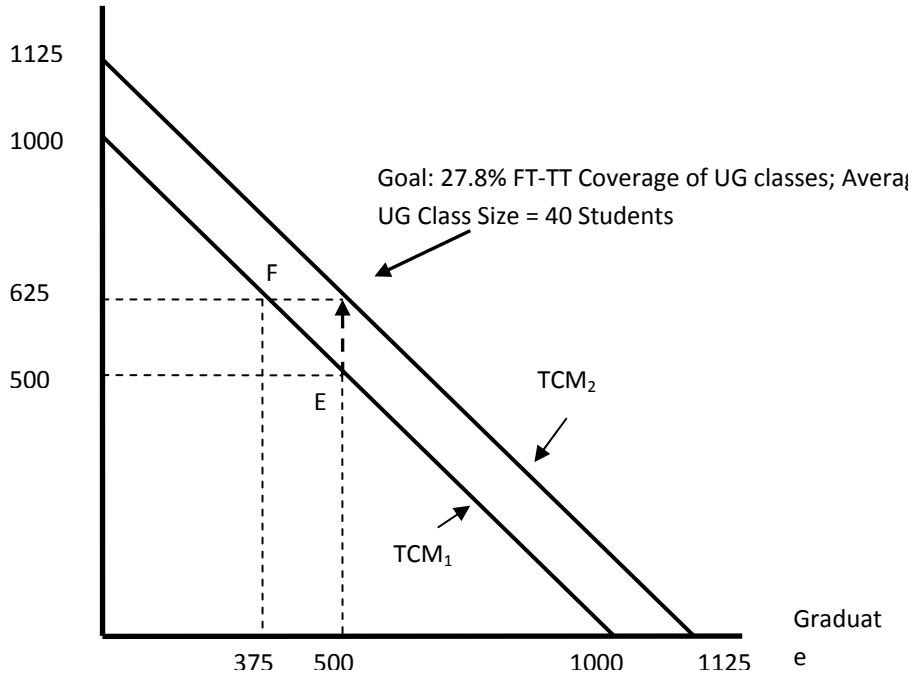
CONCLUSION

The Teaching Capacity Model (TCM) provides a clear illustration of the opportunity costs a university encounters as it attempts to enhance the undergraduate educational experience. In this paper we evaluated two possible strategies for improving undergraduate education at a mid-sized research university: (a) allocate more full-time, tenure-track faculty to undergraduate courses, or (b) reduce the average undergraduate class size. Implementing either of these strategies requires one, or a combination of, the following: (a) additional faculty lines; (b) higher faculty productivity (teaching loads); or (c) a reduction in instructional resources devoted to graduate education. The TCM presents choices related to the key elements in a straight-forward manner and provides a useful analytical framework for resource allocation discussions or strategic planning exercises.[4]

In an era of severe resource constraints, addressing these opportunity costs is a daunting task for most institutions. In one hypothetical scenario presented above, a modest increase in the percentage of full-time tenure track faculty teaching undergraduate classes would require that half of the faculty teach one more class per year; or, on the other hand, that graduate enrollments be reduced by 26%. Alternatively, assuming no reduction in graduate course offerings, 33 additional full-time tenure-track faculty would be needed. At current salary and benefit levels, this could easily add nearly $3 million to the operating budget of the institution – an unlikely outcome in the current economic climate. These types of issues are facing many institutions today. For example, just a cursory review of recent articles on higher education reveals outcomes that can be illustrated easily with the TCM approach: one university implemented an early retirement program for faculty and is now planning for larger class sizes and fewer offerings since many of the retirees will not be replaced (Mangan, 2011); another university is trimming under-performing graduate programs (and faculty positions) to meet its basic need for undergraduate instruction (June, 2010). Unfortunately, there is no indication that these choices will become easier in the foreseeable future.

1. We obtained the number of displaced graduate students by using a modified version of expression (1) for graduate students: $\Delta C = \Delta S \times \left[\dfrac{\overline{CPS}}{\overline{CS}} \right]$ where ΔC is change in number of classes can be offered, ΔS is change in number of students, $\overline{CPS}$ is the average number of classes taken per student, and $\overline{CS}$ is average class size. Since $\Delta C = -130$, $\overline{CS} = 10$ students, $CPS = 5$ classes per year, $\Delta S = -130 \times \left[\dfrac{\overline{CS}}{\overline{CPS}} \right] = -260$ students. We assume the displaced graduate students cannot be taught by part-time or contract faculty, or moved into larger classes.

2. Covering 1130 classes, with the average faculty member teaching 4 classes, requires 282.5 faculty; conversely, covering 1130 classes with 250 faculty requires each faculty member teach 4.52 classes per year.

3. If the average undergraduate class size is reduced to 40 students, we see from expression (1) that the number of required undergraduate classes increases to

UG CLASSES NEEDED $= \dfrac{(9000 \times 10)}{40} = 2250$. Hence, with 250 faculty teaching 500 undergraduate courses, the coverage rate falls to 22.2%.

4. TCM approach can be easily extended to illustrate other well-known resource allocation problems in higher education, for example, athletics versus academics; upper-division, specialized courses versus lower-division general education (core) courses; "honors" versus "regular" courses, etc.

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AN EVALUATION OF THE EFFECTIVENESS OF THE CURRICULA FOR TRANSLATION PROGRAMS AT THE UNDERGRADUATE AND THE GRADUATE LEVELS IN IRAN: PROBLEMS AND SUGGESTIONS

Ramin Rahimy

ABSTRACT

The present study aimed to investigate the effectiveness of the curricula for translation programs (training translators) at the undergraduate and graduate levels in Iran. Observations and experiences indicated that Iranian senior translator trainees at the undergraduate and graduate levels were not competent enough to perform satisfactorily in real situations of translation/interpretation careers. To investigate the sources of this problem, a pilot study was conducted that demonstrated traces of deficiency in the university curricula rather than weaknesses in the trainers per se.

To investigate the deficiencies in the curricula, nine hypotheses were formed that questioned the curricula in different ways. The hypotheses were tested through triangulation (Mackey and Gass, 2005): data were collected via questionnaire, observation, interview and test of the translator trainees. The participants of the study included two groups of senior translator trainees at the undergraduate and the graduate levels, two groups of teachers for the undergraduate and the graduate levels and one group of translation experts. The data of the study were analyzed via SPSS using descriptive statistics. The results of the study indicated that there were more deficiencies in the curriculum for translator training programs in Iran at the undergraduate level than the curriculum at the graduate level. Finally, an optimized curricular model for training translators in Iran was presented.

INTRODUCTION

Language provides one of the most readily accessible windows into the nature of the human mind. How children acquire this complex system with such apparent ease continues to fascinate the student of human language (Hakuta, 1977). The last quarter of a century, in particular, has witnessed a qualitative leap in our knowledge of the language-acquisition process in young children. In recent years, researchers have begun extending their scope of inquiry into the problem of second-language acquisition (SLA). The motivation underlying this new endeavor is two-fold: first, it provides an added perspective on human language, and second, interest in second-language teaching and bilingual education has resulted in a greater need to understand the mechanisms underlying second-language acquisition. The focus of analysis has undergone distinct shifts in perspective as a function of our changing conceptualizations of what language is and also what the learner brings to the learning situation (Hakuta, 1977).

Research on SLA has been expanded enormously since its inception. Studies of SLA have increased in quantity as researchers have addressed a wider range of topics, asked new questions, and worked within multiple methodologies. At the same time, the field has become increasingly bidirectional and multi-faceted in its applications. As new theories and research have emerged on language and learning, their application to the study of SLA has been fruitful. It has led to long-needed explanations about developmental regularities and persistent difficulties, and has opened up new lines of research on the processes and sequences of second language (L2) development (Pica, 2005).

Discovering and applying newer findings from the study of SLA to educational concerns has been the focus of long-standing debates about the role of different variables in the SLA process, specifically, about the nature of the learner's input needs and requirements. That is, what the learners learn for, or the gap between the current and the desired proficiency level. A modest, but increasing, number of SLA research findings, have had direct application to instructional decisions. Most other SLA findings have served as a resource to inform teaching practice. One of the significant applications to and from the study of SLA, *translation*, is the focus of this investigation.

Today, it is believed that translation and Translation Studies, as a discipline, share partly common grounds with Contrastive Linguistics (Granger, 2003). By virtue of their object of study, the fields of Contrastive Linguistics and Translation Studies share a great deal of common ground. As noted by Chesterman (1998, as cited in Granger, 2003) they "are interested in seeing how 'the same thing' can be

said in other ways, although each field uses this information for different ends" (p. 25).

In Iran, shreds of evidence of the importance of translation date back to at least since the Qajar era (1795-1925 A.D.). The development of translation as a discipline is demonstrated through such events as the foundation of Dar-Al-Fonoon (1847). Other attempts were made in the Higher Institute (College) of Translation and Tehran University to establish the field of translation as a major area of study by developing coursework and methods of teaching (Karimihakkak, 1999). Finally, offering courses for translation programs at the M.A. level in Allameh Tabatabaee University as well as the Islamic Azad University-Science and Research Campus and many other universities reiterate the significance of translation.

Training translators seems to be an important component of any comprehensive translation program in Iran. This is why the present study aims at evaluating the effectiveness of the Iranian curricula for translation studies.

Curriculum Development: Basic Tenets

By definition, curriculum development is a comprehensive, ongoing, cyclical process "to determine the needs of a group of learners; to develop aims or objectives for a program to address those needs; to determine an appropriate syllabus, course structure, teaching methods, and materials; and to carry out an evaluation of the language program that results from these processes" (Richards, 2001, p. 2). Therefore, the curriculum development process for translation programs should reflect needs analyses and ideologies about language, language teaching, and language learning.

According to Johnson (1989), there are four stages with corresponding decision-making roles and products –plus Evaluation– in curriculum development as illustrated in Table 1:

Table 1
Stages, Decision-making Roles and Products Plus Evaluation in Curriculum Development (Johnson, 1989, p. 3)

Developmental Stages	Decision-making Roles	Products	
1. Curriculum planning	Policy makers	Policy document	
2. Specification: ends/ means	Needs analyst Methodologists	Syllabus	
3. Program implementation	Materials writers	Teaching materials	
	Teacher trainers	Teacher training program	
4. Classroom implementation	Teacher Learner	Teaching acts Learning acts	
	Evaluation		

Table 1 illustrates that the planning stage consists of those decisions taken before the development and implementation of the program. Ends specification relates to objectives, and means specification to method; program implementation involves teacher training and materials/resources development. Decision making at the classroom implementation stage has as its products the acts of the teacher and the learner.

According to an Ankara Resource Centre report (2007), curriculum development includes: needs analysis, situation analysis, specification of goals, objectives and outcomes, syllabus design and course planning, materials selection and development, course piloting, and curriculum evaluation (p. 1).

Figure 1: Curriculum Development Cycle
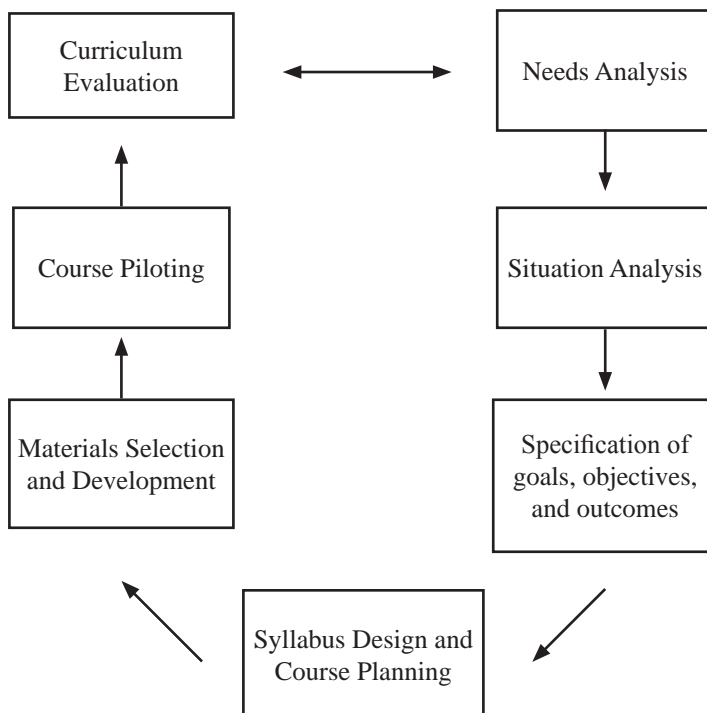
As shown in Figure 1, the process whereby a curriculum is developed is cyclic. Learners' needs should be analyzed as the first step, then, the teaching/learning situations should be analyzed by the curriculum planner which will be followed by the goals and objectives specification. After the curriculum is developed, the materials to be used in the classroom are developed and actually used by teachers. Finally, the curriculum can undergo evaluation on a needs-analysis basis given there is a mutual relation between evaluating a curriculum and the needs for which the curriculum has been developed.

STATEMENT OF THE PROBLEM

This study investigated the authenticity of the current curriculum for translation studies at the national level (Iranian curriculum). Even with the pedagogically-acceptable practices of translation both in Iran and worldwide, translator trainees' achievement has always been a matter of concern in Iran. Despite the Iranian Ministry of Higher Education providing translator trainees with curricula and course syllabi based on specified objectives, there are still problems such as the concurrency of translation teaching and language teaching, practices in translation from Persian into a foreign language, lack of teacher specialization and vagueness of the curriculum and syllabi (Mirzaibrahim, 2003). Mollanazar (2003) believed that the content of the current Iranian curricula for teaching translation is more compatible with 'Translation Studies' than 'Translator Training' which calls into question the appropriateness of such curricula. Furthermore, Miremadi

(2003), pointing to the problems of the current curricula, enumerated a number of characteristics for a competent translator including, a command in his/her mother tongue; knowledge of translation principles; familiarity with philosophical argumentations and question/answer principles; and literary components. Ziahosseini (2003) emphasized the importance of curriculum design in any program for training translators focusing on the fact that linguistic knowledge is an inseparable element that must be taken into account in designing curriculum and syllabi. Also, Heidarian (2003) pointed to the lack of agreement between the names of certain syllabi and the syllabi themselves and the lack of agreement between certain course credits and their corresponding reference textbooks as problems in translation M.A. courses.

Based on the above-mentioned points, this study tried to answer the following questions:

Q1: Is the present curriculum deficient in providing the students with the necessary knowledge and skills required to meet the challenges facing them in the process of translating at the undergraduate level?

Q2: Is the present curriculum deficient in providing the students with the necessary knowledge and skills required to meet the challenges facing them in the process of translating at the graduate level?

Q3: Does the current translation studies curriculum at the undergraduate level show serious shortcomings when compared to the curriculum used in similar areas internationally?

Q4: Does the current translation studies curriculum at the graduate level show serious shortcoming when compared to the curriculum used in similar areas internationally?

Q5: Do the methods currently used for training translators lack the necessary theoretical backgrounds at the undergraduate level?

Q6: Do the methods currently used for training translators lack the necessary theoretical backgrounds at the graduate level?

Q7: Do students have negative views concerning Iranian curricula for translation studies at the undergraduate level?

Q8: Do teachers have negative views concerning Iranian curricula for translation studies at the undergraduate level?

Q9: Do students have negative views concerning Iranian curricula for translation studies at the graduate level?

Q10: Do teachers have negative views concerning Iranian curricula for translation studies at the graduate level?

Q11: Do experienced translators in Iran consider the current curriculum to be deficient for training professional translators?

Accordingly, the following hypotheses were formed to be investigated:

H1: The present curriculum is deficient in providing the students with the necessary knowledge and skills required to meet the challenges facing them in the process of translating at undergraduate level.

H2: The present curriculum is deficient in providing the students with the necessary knowledge and skills required to meet the challenges facing them in the process of translating at graduate level.

H3: The current translation studies curriculum at the undergraduate level shows serious shortcoming when compared with the curriculum used in similar areas internationally.

H4: The current translation studies curriculum at the graduate level shows serious shortcoming when compared with the curriculum used in similar areas internationally.

H5: The methods currently used for training translators lack the necessary theoretical backgrounds at undergraduate level.

H6: The methods currently used for training translators lack the necessary theoretical backgrounds at graduate level.

H7: Students have negative views concerning Iranian curricula for translation studies at undergraduate level.

H8: Teachers have negative views concerning Iranian curricula for translation studies at undergraduate level.

H9: Students have negative views concerning Iranian curricula for translation studies at graduate level.

H10: Teachers have negative views concerning Iranian curricula for translation studies at graduate level.

H11: Experienced translators in Iran consider the current curriculum to be deficient for training professional translators.

Subjects

The subjects of the study consisted of five groups. The five groups, as described below, represent the population of the study, that is, the Iranian translator trainees in the Azad University (all branches nationwide) as well as translation trainers and professional translators throughout the country. The reasons why five groups of participants were selected were: (a) teachers and students at the undergraduate and graduate levels as well as translation experts were the foundations for the formation of the hypotheses of the study; (b) the study was supposed to be conducted nationwide so the samples had to represent the population of the study; and (c) a possible negative view or the deficiency of the Iranian curricula for translation programs had to be hypothesized as a rationale for the comparative study at the international level.

The first group of the study, the undergraduate (B.A.) group, consisted of 200 Iranian senior undergraduate translator-trainees that were selected from among the senior undergraduate students studying in the Islamic Azad University (all branches nationwide). This contains at least eight universities, that is, one university in each region of the country namely:

- The Islamic Azad University at Tonekabon
- The Islamic Azad University at Lahijan
- The Islamic Azad University at Tabriz
- The Islamic Azad University at Hamedan
- The Islamic Azad University at Rasht
- The Islamic Azad University at Tehran (Central Branch)
- The Islamic Azad University at Khorasgan (Isfahan)
- The Islamic Azad University at Mashad

The average age of the undergraduate subjects at the time of carrying out the study was 28-30 years.

The second group of the study, the graduate (M.A.) group, consisted of 100 Iranian senior graduate translator-trainees. They were selected from all those Islamic Azad University branches which offered translation at graduate level. This encompasses five universities namely:

- The Islamic Azad University at Bandar Abbas
- The Islamic Azad University at Tehran South Branch
- The Islamic Azad University at Tehran Science and Research Campus
- The Islamic Azad University at Tehran Central Branch
- The Islamic Azad University at Shiraz

The average age of the graduate subjects at the time of carrying out the study was 30-33 years.

The third group of the study, the translator trainers for the undergraduate level, consisted of teachers whose classes were observed. The eight teachers who taught the undergraduate trainees of the study were asked to participate in the study: their classes were observed during four 90-minute sessions for each teacher. The courses observed included courses on theoretical and practical aspects of translation.

The forth group of the study, the translator trainers for graduate level, consisted of teachers whose classes were observed. The five teachers who taught the graduate trainees of the study were asked to participate in the study: their classes were observed during four 90-minute sessions for each teacher. The courses observed included courses on the theoretical and the practical aspects of translation.

The fifth group of the study, the expert group, consisted of 5 professional experts in translation who participated in the interview portion of the study. There were two criteria for the selection of the professional translator group. The first criterion was having at least 5 years of experience in teaching translation at different levels, the second criterion was having practical experience in translating different works, including textbooks, novels, articles, etc.

Instrumentation and Procedures

To test the hypotheses of the study, a triangulation approach was adopted (Mackey and Gass, 2005). The justification for triangulation was that a translation test was needed to show the Iranian translator trainees' deficits in translation. Questionnaires were needed to determine participants' views on translation curriculum. And, for a comparative study, translators' views on the Iranian curricula were necessary.

Hence, the instrumentation in this study included five sections:
- Translation test
- Questionnaire for translation trainees
- Questionnaire for translation teachers
- Observation of translation classes (theory and practice)
- Interview of translation experts

The trainees' translation test consisted of translating four short semi-specialized paragraphs of different genres. The genres were entitled: "Instructions," "Journalistic-Economical," "Social," and "Journalistic-Political." In fairness to the trainees, paragraphs of scientific genres were not selected since there was no scientific course for translation practice included in the Iranian curriculum. This, omission, might bring into question the reliability and validity of the test.

Each paragraph contained about 100 words and was selected from the trainees' different teacher-made materials used in classes as well as textbooks. Two points were taken into consideration at the time of selecting the text extracts. First, the difficulty level of the passages was calculated using Edward Fry's index of readability (Farhady, Birjandi & Jafarpour, 2000). The readability degree of the passages was shown to be highly correlated for the passages at undergraduate and graduate levels. Also, the cross point between the average number of sentences and the average number of syllables per each 100 words did not fall in the gray area of the graph. (If the passage readability falls in the gray area, the grade level scores for the passage are invalid.) The second consideration when selecting text was the reliability of the passages, which was calculated through the KR-21 formula and was indicated as R=0.6 which was deemed significant, given the maximum reliability had to be +1.

The questionnaires for the trainees were made up of 108 questions for the undergraduate group and 89 questions for the graduate group based on the current translation curriculum and methods. The questionnaires were used to elicit the trainees' needs towards becoming a translator. The points that were emphasized in the questionnaires for trainees covered different aspects of the Iranian translation program including: translation theory, translation practice, translation methods, textbooks, course credits, interpretation, literature, culture and the subjects' knowledge of Persian as their mother tongue. The final version of the questionnaire was developed after questions had been revised based on the comments of three colleagues and the outcomes of a pilot administration to 40 senior trainers in the Azad University at Tonekabon (Iran).

Four observation forms (checklists) were designed for the study. These included a number of common and widely-used topics in Translation Studies, which were gathered from three main sources: (a) translation textbooks, (b) national and international syllabi, and (c) experts' views on translation studies. The forms were used to observe translation teaching classes to find out which translation teaching methods had been used by the eight trainers who taught the undergraduate trainees and the five trainers who taught the graduate trainees of the study.

Five professional translators participated in the study interviews. There were two criteria used to select the professional translator group: (a) having years of experience in teaching translation at different levels, and (b) having practical experience in translating different works including textbooks, novels, articles, etc. The rationale behind conducting interviews in the study was to obtain the participants' insights, expectations, and impressions concerning the achievements of translation studies graduates, nationwide. There were 15 questions in the interview form.

Curricula for translation studies from 25 universities in other countries (Tables 2 and 3) were used (cluster sampling, random selection) in this study for a more detailed comparison with the Iranian B.A. and M.A. translation curricula. Given a main purpose of this study to investigate the effect of translation program curricula at the B.A. and the M.A. levels nationally and internationally, it was important to understand the details of translation program curricula used in a variety of countries. Curricula at the B.A. and the M.A. levels from other countries were obtained through online internet searches. An analysis of the search results was the primary means of determining if the curricula were similar or different in terms of framework and purpose, discerning standards and benchmarks, and if there were any gaps in the Iranian curriculum.

Table 2

Foreign Universities Offering a B.A. Degree in Translation Surveyed in the Study

University	Country
Université de Moncton	Canada
Swansea University	England
Kent State University	USA
College Université de Saint-Boniface	France
University of Warwick	England
Université de Louvain	France
U.A.E. University	U.A.E.
Newcastle University	England
University of South Africa	South Africa
Hacettepe University	Turkey
Brigham Young University	USA
Total: 11	

Table 3

Foreign Universities that Offered a M.A. Degree in Translation Surveyed in the Study

University	Country
University of London	England
University of Bogaziçi	Turkey
University of Western Sydney	Australia
Kent State University	USA
Université de Louvain	France
University of Tampere	Finland
Heriot-Watt University	England
University of Birmingham	England
Universitat Pompeu Fabra	Spain
Monterey Institute of International Studies	USA
Middlesex University	England
London Metropolitan University	England
University of Ottawa	Canada
Aston University	England
University of Massachusetts	USA
University of South Africa	South Africa
Hacettepe University	Turkey
Total: 17	

FINDINGS

The results obtained supported all hypotheses of the study except the 4th and 6th hypotheses, both related to the curriculum at the graduate level. This section provides a detailed analysis of all eleven hypotheses.

Hypotheses 1 and 2

The findings of the study supported H1 and H2 of the study. The findings indicated that the undergraduate and the graduate trainees as well as trainers insisted on the importance of the four skills of language (listening, speaking, reading and writing) in addition to literature and culture. Most undergraduate trainees (more than 70%) considered Persian studies unimportant in the current translation curriculum, while the graduate trainees as well as the trainers for the undergraduate and graduate levels insisted on the importance of Persian studies in the curriculum for translation programs.

The results obtained from the translation test analysis indicated a weak translation performance by the undergraduate $\overline{X} = 0.5$ out of 20 and the graduate trainees $\overline{X} = 2.5$ out of 20. In spite of the fact that the mean score is higher for the graduate participants, they were expected to perform more competently in the test. Furthermore, although the undergraduate and the graduate participants were exposed to the same paragraphs in the test, the graduate group failed to achieve a more acceptable result as compared to the undergraduate group.

The results obtained from the trainee questionnaires demonstrated that most undergraduate and the graduate trainees (more than 74%) had chosen translation because they had been interested in the field. Also, the trainers for the undergraduate and the graduate levels believed their trainees had selected translation due to interest. The results indicated that most undergraduate trainees (more than 69%) wanted translation for future use while the trainers for the undergraduate level believed most of their trainees (more than 80%) were merely seeking a degree in translation. Both graduate trainees and the trainers for the graduate level noted an inclination toward translation for future use rather than as a mere degree.

Most undergraduate and graduate trainees (more than 76%) as well as trainers believed no courses should be omitted from the Iranian curricula for translation program while both sets of respondents suggested the addition of some courses to the current curricula. Furthermore, most trainees at both levels (more than 65%) and the trainers for the undergraduate and graduate levels believed that translators should not be trained for all fields, rather, they should be exposed to training in one or two specific fields of translation such as scientific translation, political translation, and/or literary translation. Finally, the results indicated that the trainees did not feel competent enough to be a translator.

Hypotheses 3 and 4

The findings supported H3 but rejected H4 of this study. Accordingly, it was found that the Iranian curricula for translation program at the undergraduate level differed significantly with its corresponding curricula internationally (H3) while the graduate curriculum was much more similar across counties (H4). The results from the foreign curricula analysis revealed that the Iranian undergraduate curricula differed in some key aspects with the foreign curricula. These aspects are:

<u>Admissions conditions and entrance exam</u>. Significant differences were indicated to exist between the Iranian curricula and the foreign curricula in terms of the form of Entrance Exams. Before entrance, the Iranian candidates for an undergraduate major in translation are required to take part in an exam with content based on a number of high school courses including English grammar, reading comprehension, and vocabulary knowledge, as well as some non-English courses including Persian grammar, Arabic grammar, and Theology (Iranian Universities Entrance Exam Handbook, 2010). No practical translation test is taken by the candidates. The Iranian candidates for a graduate major in translation are required to take part in an exam consisting of the following undergraduate courses: (a) Theories of Translation, (b) Persian Language Structure, (c) English Linguistics, and (d) Practical Translation (multiple-choice tests of translation for various genres). In contrast, University of South Africa curriculum required the graduate trainees to submit four papers on translation issues before they could apply for a translation major (University of South Africa, 2009). There, translation has been defined as a specialization among specializations of linguistics. Moreover, the University of Massachusetts, as another example, requires candidates to have the following qualifications at the time of admission for a translation program at the graduate level:

- Minimum undergraduate GPA of 2.75
- A bachelor's degree or equivalent

- Two official transcripts
- Two letters of recommendation
- Proficiency in English
- Excellent knowledge of one foreign language
- Sample of translation or critical essay
- The Graduate Record Examination (GRE) test
- Foreign students need to have taken the TOEFL test or have attended a North American college or university on a full-time basis for one year (University of Massachusetts, 2008).

The purpose of the program. The purpose of administering a translation program at the undergraduate and the graduate levels presented by the Iranian Ministry of Higher Education has been very briefly stated and contains no clarified and operationally-defined objectives compared with that of the international curricula; rather, it has mainly emphasized "achieving the proficiency in language skills" and "achieving the necessary skills as a translator" (Iranian Ministry of Science, Research, and Technology, 1991, p. 3). In contrast, in the foreign curricula each main concept has been clearly defined, for instance, in the curriculum presented by Aston University (England), the term Translator has been defined along with his responsibilities as a translator and the community expectations of him (Aston University, 2010), or in the Université de Moncton (Canada), concepts such as 'dissertation' or 'seminar' have been defined in terms of purposes and activities (Université de Moncton, 2009).

Type of courses offered. The Iranian undergraduate curricula were found to be significantly different in content from the international curricula. It lacks a number of basic courses related to the knowledge and skills of translation. One major difference was that most international curricula seemed to address updates in other fields such as science and technology. For instance, Hacettepe University in Turkey offered a course entitled "Translation of Texts on Banking" and a course on "International Relations" (Hacettepe University, 2008). Finland's University of Tampere offered a course on "Digital Literacy and Academic Knowledge Management" (University of Tampere, 2011) which cannot be found in the Iranian curricula.

There were also differences between the Iranian and foreign curricula in terms of practical courses offered for translation studies. Aston University curriculum required the trainees to spend their third year of university education abroad, i.e. in the country of their target language (Aston University, 2010). Kent State University curriculum for the undergraduate level required the trainees to conduct a case study in translation and report the results to their trainers. Also, Kent State University offered translation as a B.S. major instead of a B.A. (undergraduate) major. The curriculum, for such a major, included courses in different fields such as biology, economy, geology, etc. (Kent State University. 2011)

Order of the courses offered. A number of universities offered their courses in a specific order that differed significantly with the Iranian curricula. For example, the University of Tampere in Finland offered translation courses from the undergraduate level to the graduate level in a sequence from "Basic," to "Intermediate," "Advanced" and "Dissertation" (University of Tampere, 2011). The University of London offered its courses of translation as "Language-Specific Practical Translation Courses," "Translation Studies Courses" and "Electronic Communication and Publishing Modules" (University of London, 2008).

Emphasizing specific courses. Foreign translation programs had differing areas of focus. For example, Swansea University emphasized Computer-Assisted Translation, Machine Translation and Translation Skills Laboratory (Swansea University, n.d.). Kent State University offered translation education as a B.S. rather than a B.A. degree. Its curricula for translation studies at the undergraduate level focused more on courses such as Social Science, Business, Fine Arts and Civilization (Kent State University, 2011). University of Louvain offered courses on International Relations, Informatique, Psychology, Philosophy, Economy and Sociology at the B.A. level (Université de Louvain, 2011).

Some programs emphasized translation skills and theoretical courses. The University of United Arab Emirates curriculum for the undergraduate level contained courses on Modern Media Communication as well as courses from other programs such as Morphology, Syntax and Literary Texts Analysis (University of United Arab Emirates, 2008). The undergraduate translation curriculum at the Newcastle University emphasized Translation Workshop (20 Credits), Translation Practice and Principles (30 Credits) and Research Methods in Translating and Interpreting (10 Credits) (Newcastle University, 2008). The University of London insisted, in its curriculum for the undergraduate level, on Translating from and to the

target language, Translation Theories and Internet/Computer-Assisted Translation (University of London, 2008).

University of South Africa curricula for the undergraduate translation studies contained courses such as European Institutions and Organizations, Translation Tools, Note-Taking and Sight Translation (University of South Africa, 2009).

Culture was emphasized in some curricula. The University of Warwick University translation curriculum emphasized language culture and the British Cultural Studies (University of Warwick, 2010). In contrast, University of Birmingham curriculum for undergraduate translation studies focused on the target language culture, thus, included courses such as Cultural Inquiry (1), Cultural Inquiry (2) as well as Modernity, Identity and Culture. Its curriculum for the graduate translation studies included the courses Nations and their Neighbors I & II (University of Birmingham, 2008).

Hypotheses 5 and 6

H5 of this study was supported while H6 was rejected. Traces of insufficiency were found in the theoretical part of the undergraduate Iranian curriculum while the graduate translation curriculum was at an acceptable level in terms of theoretical richness.

The results from the interview analysis indicated that semantic translation, free translation, literal translation and word-for-word translation were the current methods of translation used in Iran. Current problems of the Iranian curricula include lack of sufficient practice and discrepancy between theory and practice in the curriculum. Communicative translation appears to have been ignored in the Iranian translation program curriculum.

Interviewees expressed opinions on whether courses should be kept or dropped from the curriculum. Interview respondents suggested that Foundations of Translation, Teaching and Testing, and practical courses of translation had to be maintained while certain general courses and Phonology had to be removed. Psychology of Learning, Pragmatics, and Semantics, Note-Taking, Morphology, Persian Syntax, Culture and Translation Workshop were courses suggested to be added to the current curricula for translation program. Teaching Persian grammar was considered necessary at the undergraduate and the graduate levels. Literature, culture, special terminologies, and practical courses, including scientific translation, were introduced as new courses that could be added to the current curricula to enhance the effectiveness of translation programs.

No compatibility was believed to exist between the textbook and the undergraduate curriculum while the graduate curriculum and the textbooks were thought of as compatible. Internationally authored textbooks were considered appropriate for teaching the theory of translation and the domestically authored textbooks were considered appropriate for working on the practical aspects of translation. At the undergraduate level the amount of theory was commented to be less than the amount of practice in the curriculum, while at the graduate level, the theory was thought of as a greater proportion of the curriculum than the practice. A curriculum with more practical courses on translation which could focus on the process of translation was preferred by the interview respondents. Paradoxically, concerning the degree of emphasis on the theory and practice of translation, the interviewees believed the trainers had to focus on more theory at the undergraduate level and more practice at the graduate level.

Multiple-choice tests, cloze tests (a passage with each 5th or 7th word deleted except for the first and the last sentences, to be filled in by the translator trainees, the full translation of the passage) and production tests were mentioned by the interviewees as the current authentic ways to test translation.

Lack of motivation and problems of future career were reasons other than the curricula for the failure in training translators.

Hypotheses 7, 8, 9 and 10

Hypotheses 7, 8, 9, and 10 all dealt with instructor and trainer impressions of the adequacy of the Iranian translation curriculum. The findings of the study supported H7, H8, H9 and H10 of this study. The data obtained from the questionnaires for the participant trainees and the trainers at the undergraduate level demonstrated that 70.5% of the undergraduate trainees as well as 63% of the trainers at the undergraduate levels believed that the curriculum for training translators was not sufficient in satisfying the trainees'

needs. Also, 51% of the graduate trainees as well as 59% of the participant trainers at the graduate level believed that there were deficiencies in the curriculum.

Hypotheses 11

The eleventh hypothesis of the study addressed the view of participant experts (experienced translators) on the Iranian curricula for translation. This hypothesis was supported. The interviewees of the study believed the current undergraduate curriculum for training translators in Iran was deficient in some aspects. The undergraduate practical courses of translation consist of only 2 credits (a total of 34 hours) (Iranian Curriculum for Undergraduate Translation Program, 1991). During this period of time, few texts can be translated and revised in various genres (generally not more than 10 paragraphs of about 200 words). This limited number of texts is not sufficient for mastering the necessary principles and techniques of translating a specific genre while. In contrast, in the Newcastle University (England), translation practical courses consist of more than 10 credits (Newcastle University, 2008). Some foreign universities place much greater emphasis on the practical courses of translation.

The participant experts agreed that the phonology course should be omitted from the undergraduate curriculum. They noted the course was rarely relevant to written translation issues; rather, it could be applicable in oral interpretation, provided the written translation and the oral interpretation were offered separately as two different but interrelated majors of study in the Iranian translation program. The phonology course was not included in the undergraduate curriculum of the universities surveyed in this study except for Kent State University (USA) that offered a 3-credit Phonetics course (Newcastle University, 2008).

The interviewees further agreed that a number of courses needed to be added to the undergraduate curriculum. These included courses related to literature, culture, special terminologies and practical courses including scientific translation. They noted getting acquainted with the second language and target language cultures as well as literature assist translators in mastering second language texts semantically, rendering a more acceptable translation. This finding is supported in the review of undergraduate curricula conducted for this study. For example, the University of United Arab Emirates offered 12 course credits of target language literature and culture (French) (University of United Arab Emirates, 2008). Other courses suggested by the interviewees to be added to the graduate curriculum were: Psychology of Learning, Conference Translation/Interpretation. They are compatible with what Miremadi (2003) suggested.

Finally, the participant interviewees commented testing methods of translation. They thought that translation could be tested via multiple-choice and cloze tests as well as translation production tests. They suggested the multiple-choice and the cloze tests since these could be scored objectively compared with the production type of translation tests.

DISCUSSION

The findings of this study highlight deficiencies in the current Iranian curricula for translation programs both at the undergraduate and graduate levels. The findings also suggest potential curricular modifications in the undergraduate and graduate translation programs in Iran.

Any suggested curricular modifications must take into consideration the practical constraint that undergraduate programs may not exceed 4 years and graduate programs may not exceed 2 years, both due to the official obligations of the Iranian Ministry of Higher Education and the fact that the approved programs are used nationwide. Yet there are still a number of course changes that can be made to the current curricula without impacting overall program length.

Suggested Courses to Be Added to the Undergraduate Curriculum

At the undergraduate level, the following course credits were suggested to be added:

English Culture. The significance of culture in teaching translation cannot be ignored. According to Karamanian (2004), translation, involving the transposition of thoughts expressed in one language into the appropriate expression of another group, entails a process of cultural de-coding, re-coding and en-coding. As cultures are increasingly brought into greater contact with one another, multicultural considerations are brought to bear to an ever-increasing degree. Also, universities such as Warwick (4 credits) and Louvain (2 credits) offer course credits on cultural studies (Université of Louvain, 2011; University of Warwick,

2010). As a result, a course on English culture (at least 2 credits) is helpful for the Iranian trainees to obtain the necessary insights.

Persian Studies. Persian language plays a significant role in translation for the Iranian trainees. Since Iranian trainees translate various text genres mostly from English into Persian during their translation education, they should be able to present a translation that is natural to the native speakers of Persian. Yet, the course credits on Persian language in the current translation curriculum at the undergraduate level are not sufficient to enable the trainees to use a well-formed Persian in their translations. This is also supported by the results of the translation test analysis of this study. Accordingly, the undergraduate participants' mean scores on the translation test indicate that their translations contain problems in Persian language including grammatically or semantically ill-formed sentences. Hence, the following course credits (at least 2 credits for each course) on Persian language are suggested to be added to the current curriculum for the translation program at the B.A. level: (a) Persian Reading Comprehension, (b) Persian Writing, (c) Persian Prose, (d) Persian Poetry and (e) Persian Culture.

Scientific Translation. The current Iranian undergradute curriculum for translation contains no course credits on translation of scientific texts. Consequently, Iranian trainees fail to have any practice on texts such as biology, zoology, physics, chemistry, or mathematics. This may result in the emergence of a problem in the trainees' future career: they will avoid translating such texts. The significance of scientific texts can be emphasized since some foreign universities have offered courses on this field of study. For example, Université de Moncton offered in its curriculum a 3-credit course on theatre text translation as well as a 3-credit course on commercial translation (Université de Moncton, 2009). Université de Louvain offered a 2-credit course titled: "Scientific Text Problems and Translation Techniques" (University of Louvain, 2011) and Hacettepe University offered a 4-credit course titled: "Language Use in Different Fields" and a 2-credit course named: "Medical Translation" (Hacettepe University, 2008). Thus, for the Iranian translation trainees at the undergraduate level, a course of scientific translation (at least 4 credits due to the variety of scientific genres) is suggested.

Thesis: The Iranian curriculum for translation at the undergraduate level contains no actual and official thesis as a course credit. There are term projects for various translation courses and the time restriction prevents the trainees to be able to translate a complete work into Persian. In "Individual Translation I & II" the trainees have the opportunity to translate by themselves and check their own abilities in translating. Yet, the shortcoming of such an activity lies in the fact that most texts translated in these courses are not complete works; rather, they are mostly part of a larger work (e.g. a book) and there have been cases in which the assigned text has been repeatedly translated. Therefore, a course of thesis (2 to 4 credits) can be suggested to be included in the undergraduate curriculum for translation under the following conditions: (a) the assigned text should not be previously translated, (b) the assigned text should be a complete work rather than a part, (c) the assigned text genre should contribute to the language and the culture of the country (Iran), and (d) if the assigned text genre is scientific, it should present a new phenomenon to the target language readership.

Suggested Courses to Be Omitted from the Undergraduate Curriculum

At the undergraduate level, the following course credits were suggested to be deleted:

Principles and Foundations of Translation. This two-credit course can be combined with another similar 2-credit course named "Principles and Methodology of Translation" to make a 2-credit course named "Theories of Translation." The content of the two courses currently overlaps.

Phonology. The phonology course is suggested to be omitted from the curriculum as it mainly contributes to teaching English as a foreign language and not training translators. If not omitted totally from the curriculum, it could be offered as an elective course for those students who need further practice on prosodic aspects of language in their interpretation or consecutive translation studies.

Suggested Courses to Be Added to the Graduate Curriculum

At the graduate level, the following course credits are suggested to be added:

Practical Translation. There are only two practical courses of translation in the current curriculum for the translation program at the graduate level. The first one is "Criticism of Translated Works" in which

students may correct possible translation problems and the second is "Translation Workshop" in which the trainees get acquainted with practical aspects of translation. Hence, the Iranian graduate trainees do not actually translate texts of various genres as they did during their undergraduate education. In addition, a survey of the foreign curricula for translation programs at the M.A. level reveal that they have emphasized the practical aspects of translation by offering several course credits on translation practice. Université de Moncton offered about 15 credits of various practical translation courses (Université de Moncton, 2009); The University of London offered 10 course credits on advanced translation from various source languages into English (University of London, 2008); Kent State University offered Translation Practice (2 credits), Literary and Cultural Translation (2 credits), Scientific, Technical and Medical Translation (2 credits) and Commercial, Legal and Diplomatic Translation (2 credits) (Kent State University, 2011). Thus, it is suggested that a course of translation practice of at least 2 credits be added to the graduate curriculum for translation programs in Iran.

Oral Interpretation. According to Miremadi (2003), Iranian translation trainees have insufficient communication with the real context in which oral interpretation is implemented. The graduate curriculum for translation program in Iran lacks course credits on oral interpretation that may be applicable to the trainees' future translation career, for example, conference interpretation. Regarding the trainees' future use of translation and due to most trainees' failure in their oral interpretation performance, it is suggested that a 4-credit course of oral interpretation be added to the current graduate curriculum for translation in Iran.

Dissertation. There is a course of Dissertation (4 credits) in the current graduate curriculum in Iran. The trainees work on their dissertation topics descriptively (library research), experimentally, or they criticize a translated work. No graduate dissertation in the field of translation is submitted in the form of translating a work. The course of dissertation can be modified in the graduate curriculum to allow trainees the opportunity to translate a complete work (book) on various genres including literary, social, economic, technical, etc. from English into Persian or from Persian into English. The conditions mentioned for undergraduate theses should be followed: (a) the assigned text should not be previously translated, (b) the assigned text should be a complete work rather than a part of a larger work, (c) the assigned text genre should contribute to the language and the culture of the country (Iran), and (d) if the assigned text genre is scientific, it should present a new phenomenon to the target language readership.

Suggested Courses to Be Omitted from the Graduate Curriculum

The findings of the study give no insight or feedback for an actual omission of any course credit from the graduate curriculum for translation programs in Iran. The comparative study between the Iranian graduate curriculum for translation and similar international curricula indicates that the Iranian curriculum has been able to satisfy the needs of the graduate translator trainees in terms of theory and practice although such curriculum shows more deficiency in terms of the practical aspects of translation in comparison with the undergraduate curriculum.

CONCLUSION

The results of this study revealed traces of deficiency in the Iranian curricula for translation programs, significant differences between the Iranian and the foreign curricula for translation programs, and the negative views of the participant groups of the study on the current curricula. Proposing a modified version of the curricula can include objectively-defined key terms such as goals, course credits, written translators and oral interpreters and the entrance requirements. Furthermore, adding certain course credits to the curricula both at the undergraduate and the graduate levels can help university teachers to maneuver better over the syllabus and classroom techniques in order to obtain more reliable results—more competent translators.

Theoretically, the findings of the current study are significant in that they provide a refreshingly unprejudiced contribution to translation theory through adopting a new approach to translator training, particularly, curriculum development. The study considers the current Iranian curriculum for training professional translators deficient, and seeks to give way to a more appropriate curriculum planning by making suggestions to the challenges facing the translator-training programs at the undergraduate and the

postgraduate levels.

Pedagogically, the findings of the current study can be of use to a people involved in both the theory and the practice of translation. Translation trainers may employ the results of this study as a new orientation in their real practice of teaching translation in the classroom. Language testers will use the findings of this study in their procedures of psychometry and test construction based on what has been instructed in classes by trainers. Psychometrists, further, take into consideration the results of the current study in planning for group exams, such as university entrance exams or prerequisite proficiency exams for translation studies. Translation program evaluators can also benefit from the results of this study when they are presenting any assessment report on a given curricula or designed course for translation studies. Professional translators both as university trainers and as members of organizations, institutes or translation houses, can follow the major tenets of the model presented here in their professional/practical jobs in translation. The findings of this study can, further, be utilized by the Ministry of Higher Education to study and evaluate the content of various curricula in an international context. University students can take advantage of the results of the comparative model in their research projects on different fields particularly, applied linguistics. Finally, the results of this study can be utilized by various educational organizations such as the Ministry of Education for evaluating the content of the curricula of programs at the primary, intermediate, and advanced schools. Organizations can revise and update curricula for different programs by comparing them with corresponding international curricula in order to achieve the educational objectives and goals.

As for the proposed modified version of the curriculum, it gives insights into how to improve Iranian curricula for translation programs. In comparison with other curricula, the modified curricula are advantageous in that they have been presented based on a series of data collection procedures including the administration of translation tests as well as observing translation classes and interviewing teachers and experts in translation. In addition, since the modified curricula were formed based on a comparison with 25 international curricula for translation programs, they are expected to remove the existing deficiencies in the current Iranian curricula for translation programs by making them more compatible internationally. Thus, they are reliable enough to be employed at least within a domestic and nationwide framework of translator training.

The aim of this study is by no means suggesting that imitating other countries' curricula for a certain field of study will necessarily result in an optimized curriculum. Rather, improving the curriculum for translation programs that can enhance more success in training translators is intended. Surveying different curricula opens a new window to experts' approaches toward developing curriculum from which the most compatible approaches can be adopted, thought of, arranged or rearranged, and implemented.

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QUALITY OF LIFE AND STANDARD OF LIVING: PLANNING FOR CONFLICT OR COOPERATION

Agostino Menna

ABSTRACT

This study addressed the decisions Canadian school boards make in terms of quality of life and standard of living and how these reflect their notions of the purposes of education. In addition, it investigated the benefits of education from the perspective of the indicators quality of life and standard of living. The study was not designed to measure the monetary value of education but rather the values of education from the perspective of school boards (districts), administrators, and trustee. Therefore, this research is about "why do we invest in education?" The study also highlights the value component of trustee/superintendent decision making by specifying and categorizing types of indicators that define quality of life and standard of living from their personal and professional perspective.

Results suggested that school boards have multifaceted policies, plans, and priorities which relate to quality of life and standard of living. The indicators most valued by the school boards consisted of employment/income, health, safety, and human rights. The research revealed that administrators had intrapersonal value conflict between their personal and professional values; whereas, trustees (elected to govern school board) had no intrapersonal conflict between their personal and professional values. This conclusion was related to the fact that trustees were making decisions based on both personal and professional knowledge and experience, and were being more genuine in their roles. Superintendents who are defined as senior managers, were somewhat more constrained by their roles, and the need to project congruency with their professional values and their school board's official position, even in cases where it may have conflicted with their personal values.

INTRODUCTION

This article is based on research conducted in 2007–2008 and relates to Canadian school boards' intentions in planning and assessing the benefits of education. Benefits of education in this study are defined as quality of life and standard of living. Both concepts are used as indicators to investigate the nature, value, and purpose of education from the perspective of official school board documents and administrator values at both the personal and professional level.

Previous research on the benefits of education has been mainly conducted from an economic perspective and primarily is concerned with three strands of investigation: first, education as a private investment based on the rate of return for money, so investment tends to be high, paying the individual dividends in terms of higher income; second, education as a public investment by "neighborhood effects" or "externalities," that is, one tends to be a better citizen and, therefore, increases public good; third, education seen to contribute to economic growth (Cohn & Geske, 1990; Grubb & Lazerson, 2004; Hy, 2000; McMahon, 2006; Psacharopoulos, 1994).

Educational benefits are defined either economically or socially; school boards define these concepts through decisions and planning and the values they hold. Benefits imply multiple outcomes and multiple meanings to various stakeholders in society. In general, benefits received from education are believed to result in economic and social improvement (Haverman & Wolfe, 1994; McMahon, 2006; McMahon & Geske, 1982; Psacharopoulos, 1985). Viewed from a social perspective, benefits are activities contributing to effective civic and charitable institutions, less poverty, more social capital, lower prison costs, and better family planning (McMahon, 2006). This line of reasoning is consistent with improvements in quality of life for society and/or individuals. Benefits, as researched extensively by Psacharopoulos and Patrinos (2004), can also be viewed from an economic perspective, related to income, employment, human capital, and economic growth. This conception of benefit is consistent with standard of living gains. The economic and social benefits debate implies a competitive nature that arises from both types of benefits and, therefore, it is important to investigate how educational planning treats both concepts. The competitive nature of quality of life and standard of living implies the value derived from budgetary decisions made by schools boards, that is which goals are funded more by school boards, becomes competitive in nature.

Thus, the major research question of this study was "To what extent are the values of quality of life and standard of living reflected in the purposes of education, as demonstrated by educational policies, plans, funding, and administrator values at the school board level?" This research question was addressed by the following sub-questions: To what extent do school board plans, policies, and strategy reflect goals of quality of life and standard of living?; What are school board administrators' priorities regarding goals of education in terms of quality of life and standard of living?; Is there a consistency between school board plans, priorities, and administrator perceptions in terms of goals of quality of life and standard of living?

Significance of the Study

Purposes of education and values are related inasmuch as the former are value imperatives (Hodgkinson, 1991), or end values of society that educators consider necessary to emphasize at a given time (Peters, 1977). This study was undertaken to contribute to our understanding of educational decision-makers' plans and policies reflected in these perspectives.

Previous studies in education provide correlational evidence that demonstrates the relationship education has to outcomes of social and economic benefit. Wolfe and Zuvekas (1995) reported on education benefits that impact social outcomes. For example, there is evidence that education is associated with reduced criminal activity and positively associated with research development and diffusion of technology. There is descriptive evidence to suggest that education is positively associated with voting and a stable democratic society and reduced alienation and inequality, as well as better health and family planning (Wolfe & Zuvekas, 1995). In terms of economic benefits, quantitative studies reported by Cohn and Geske (1990) showed the relationship education has to income and employment.

Correlational and descriptive research has tended to assess the measurable effects of education on economic and social outcomes after having been diffused throughout society. No research has been done using quality of life and standard of living indicators to organize the various benefits of education. Most of the research to date presented the benefits of education in a quantitative manner, which results in research that misses underlying relationships with the purposes of education. Moreover, most of the research on the benefits of education presents questions related to how much should be spent on education as opposed to *why* it is being spent (McMahon, 2006).

Previous research strips away values and observed actions from context (Psacharopoulos & Patrinos, 2004). This study was designed to go beyond snapshots of "what" or "how many" to explore how and why things happen as they do. The emphasis is on lived experiences and meaning that superintendents and trustees (individual school board members) have about educational outcomes embedded in context. The contribution of this research is that educational outcomes are being observed from various school board perspectives before being diffused throughout society. In addition, educational outcomes are being interpreted by superintendents and trustees by meanings they place on them, their perceptions, assumptions, prejudgments, presuppositions, and connecting these meanings to official school board policies and to the social world around them.

CONCEPTUAL FRAMEWORK

The School Board and Goal Incompatibility

School boards, like other organizations, operate within an environment of change. As context changes, planning becomes more difficult. Operating within the context of change, described as chaos and complexity (Begley, 2000; Hargreaves, 1994), administrators and school board trustees face conflicting decisions that impact the values they hold and the plans they create. As the system evolves and as context changes, planning can be viewed as a set of interdependent phases externally driven and internally defined. The defining moments faced by organizations is often path dependent: a decision, at a critical moment, can direct the system down a path that diverges widely from the one it otherwise would have followed (Homer-Dixon, 2001). Put another way, where the system (school board) is at any given time depends crucially on where it was – that is, on the accumulated events and decisions that have made up the system's history to that point.

As various external events impact school boards, they are increasingly characterized not only by greater control, but also paradoxically by greater fragmentation. (Bottery, 2002). Such trends toward

fragmentation and control are generated by a confluence of different forces, particularly coming from the increasing globalization of the world economies (Castells, 1994; Homer-Dixon, 2001; Ramo, 2009; Rifkin, 2000). As these have profound effects generally, and upon school boards in particular, it is wise for school boards to develop educational plans and, as well, for administrators develop responses to these influences and their effects.

Exacerbating this situation is the problem of educational goals or purpose of education. That is, goals are rarely clear and often conflicting and rapidly changing. The educational system is expected to deliver outcomes with unclear, unrealistic, or competing expectations (Cuban, 2004, Kelley, 1997). The debate amongst researchers, educators, and philosophers about the purpose of schooling began when schools first opened. Was schooling training for work, individual fulfillment, as a preparation for citizenship, to infuse a sense of patriotism, to support the Christian ethic, or simply for intrinsic value of liberal education (Bedard & Lawton, 2000; Gidney,1999; Osborne, 1999)? Not only were there disagreements about their purpose, each of these distinct purposes were defined very differently at different times. Others have framed the contentiousness of educational goals as a dichotomy between social and economic goals (Lawton & Tzalalis, 1994).

A value is a conception, explicit or implicit, distinctive of an individual or characteristic of a group, of the desirable which influences the selection from available modes, means, and ends of action (Kluckhohn, 1951). From this conception of the desirable, emerges a code or standard of behavior. Kluckhohn specifies desirable, conceptions, and selection as the three foci in his definition. Hodgkinson (1978, 1983) bases his definition of value on Kluckhohn's concept of the desirable. Choice is again considered important to the concept. In his discussion, Hodgkinson emphasizes a polar-relationship between value and fact. Hodgkinson (1978, p. 105) states that facts refer to propositions, which are ostensibly publicly verifiable and in some ways possess the quality of being true. Value, on the other hand, can never be true or false. A value is a function of the individual's mind. The world of fact is given, and the other, the world of value, is made (Hodgkinson, 1978, p. 104). This sets up a theme of opposition between objectivity (facts) and subjectivity (values).

Berleant (1973) believes that values must be conceptualized with reference to the human activities of believing, striving, and responding in all sorts of ways to the things and events which men encounter. He frames his discussion of facts and values within a context of experience and judgment. Berleant focuses on the experience of value on the value side, and statements about the experience, on the fact side. The facts or statements about the experience are verifiable. Cognitive and non-cognitive expression results from the experience of value. Beck (1974), like Kluckhohn (1951), also believes that values are based on human need. This need is expressed through an attitude of acceptance. For both Beck and Hodgkinson (1978), the attitude is identified as a more surface level phenomenon than values. An expression of value is formulated by factual claims plus individual expression. Beck's approach to value and theory in value, therefore, is one of limited objectivity. In these terms, limited objectivity represents a middle path on the issue of objectivity.

For Rokech (1973), a value system is a learned organization of principles and rules to help one choose between alternatives. Values are ordered, with this system, along an ongoing continuum which specifies their relative importance. The system is, therefore, an integrated, holistic orientation similar to Beck's (1974) conception of value system where values are balanced – not treated in isolation. Rokech similarly frames his discussion of values in terms of the matter of choice and selection from a number of possible alternatives.

Other aspects of Rokech's (1973) view also correspond to other theorists reviewed. His identification of value as something which refers to a mode of conduct, which, in turn, gives rise to standards that guide action, is one such similarity. Values are seen as an expression of human need which is in common with a number of value theorists. For Rokech, a value is an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence. It is operative in conflict resolution and decisionmaking. This perspective is reflected in Johnston's (1987) view that values serve as guideposts; they tell individuals what they generally act in accordance with, what individuals profess, and what values help determine the correctness of any action either by the individual or institution might propose.

Later research investigated applied science models based on informed intuition. The applied science approach views knowledge as an instrumentality for the manager (Kennedy, 1984). Borrowing from the bureaucratic model, this view asserts that the best information available should be applied to the identification and definition of problems and then to selecting a treatment based on accepted current practices. In application, the applied science model often is merged with what Sergiovanni, Burlingame, and Coombs (1987) described as "reflective practice." This model posits that professional decision-makers rely heavily on informed intuition as they create knowledge and that such intuition is informed by theoretical knowledge and an appreciation of the management environment. Later work by Leithwood and Stager (1989) showed values to be a central pillar in decision making, often acting as substitutes for knowledge.

More recent research further investigated the role of values in decision making. Societies have become more pluralistic and demands and needs of interest groups in communities more diversified and insistent. The nature of school administration has altered dramatically (Begley, 2000). According to Begley, one outcome is the increase in value conflicts that occur in school environments. Furthermore, the role of educational leaders has become much less predictable, less structured, and more conflict-laden (Begley, p. 26). This leads to situations where consensus cannot be achieved, rendering obsolete the traditional rational notions of problem solving. More than ever, administrators recognize that the values manifested by individuals, groups, and organizations have an impact on choices made in school boards when making strategic and policy level decisions.

What school boards decide and what they implement signifies what is valued. Values are a conception, explicit or implicit, distinctive of an individual or characteristic of a group, of the desirable which influences the selection from available modes, means and ends of action. (Parsons & Shils 1962, p. 395) In administration, the making of choices is usually termed decision making or problem solving: activities familiar to most administrators. Willower (1992) puts it this way: "because a significant portion of the practice in educational administration requires rejecting some courses of action in favour of a preferred one, values are generally acknowledged to be central to the field" (p. 369). This line of reasoning is further corroborated by Ryan (1999), who says: "To be sure, every decision an administrator makes involves some sort of value choice" (p. 79).

The Parsons and Shils' (1962) definition expands the scope of the term value beyond the relatively narrow philosophical domain of the metaphysical to several other types of value relevant to educational administration. It includes: social ethics (Beck, 1990, 1993, 1999; Cohen, 1982; Frankena, 1973); transrational values (Hodgkinson, 1996); the rational moral domain of administrative decision making (Shapiro & Stefkovich, 2000; Strike, 1999; Willower, 1992, 1999); plus the realm of self-interest and personal preference (Begley & Johansson 1998; Evers & Lakomski 1996; Hodgkinson, 1996).

By unraveling the quality of life and standard of living decisions, it will be possible to identify the underlying values that are at work at both the personal, professional, and organizational levels. As Begley (2001) notes, the sophisticated administrators are wise to distinguish consciously among the arenas of personal, professional, organizational, social, and economic values of their environments.

METHODOLOGY

The research design for this study was qualitative. Qualitative researchers perceive what is happening in key episodes that represent lived experiences with direct interpretation and stories (Stake, 1995). This type of methodology was chosen because a profound understanding of the sample was required through conversation and in their natural setting in order to gain insight into policymakers' values about quality of life and standard of living as it relates to purposes of education. A second consideration for using the qualitative method is to understand the dynamic nature of decision-makers' constraints in formulating purposes of education within a complex system that cannot readily be reduced to a few discrete variables and linear, cause-effect relationships. The purpose of the methodology is to understand perceptions in-depth, not necessarily Generalizability of findings.

Data sources included interviews with senior level officials, such as superintendents and trustees, as well as the examination of documents and artifacts, such as strategic plans, school board minutes, newsletters, Director's reports and Chair's reports. These public documents were accessed via

websites and site visits from November 2007 to February 2008.

Four school boards were selected for the study out of 72 school boards in Ontario. Qualitative inquiry uses non-probability sampling as it does not aim to produce a statistically representative sample or draw statistical inferences. A purposive nonrandom sampling technique was used which allowed flexibility in choosing the specific participants needed for this study. The characteristics of the participants were used for the basis of the selection process in order to reflect the sample of interest. The sampling criteria were based on the following characteristics: school boards were first categorized into four geographic regions. The geographic regions were Northern, Southern, Eastern, and Western Ontario. The list of school boards in each region was broken down into four categories: size, in terms of student enrolment (large/small); type (public/catholic); geographic (urban/rural); and language (French/English).

The planned sample size of participants was 20; however, 11 school board trustees and 7 superintendents agreed and took part in this study. Of the 11 trustees, 1 was a chair of the board and the rest were regular trustees. Of the 7 superintendents, 5 supervised a portfolio of schools, 1 was from Operations, and 1 was from Human Resources.

Interview questions were developed and administered to the 18 participants. The specific interview questions were structured in that the questions and order of presentation were determined. The interview questions related to each research question as well as the conceptual framework, which was based partially on the Calvert-Henderson Index and Menna (2009) depicted in Figure 1.
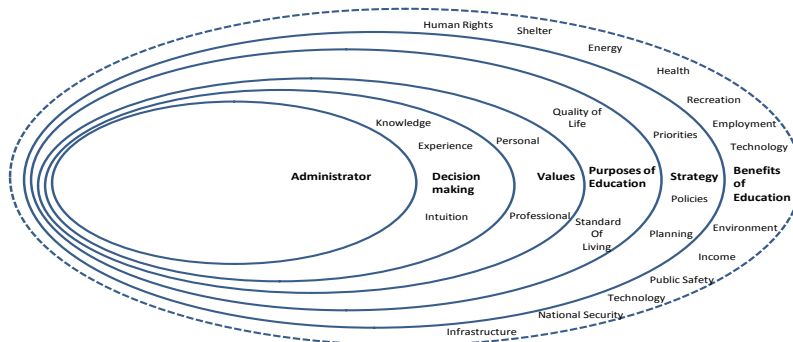

Figure 1 Conceptual Framework of Questions based on Calvert-Henderson Index

The *benefits of education* are the variables of quality of life and standard of living that actually have some positive benefits from the decisions made by school boards. In addition, this part of the framework involves appraising the outcomes of the decision and strategies made.

The *strategy* consists of plans, policies, and priorities. The three factors together provide major guidelines for action; they create frameworks that allow for direction and action. In this research, strategy is reflected in decisions and actions of the school board that determines its long-run performance and direction. School boards have strategies that involve setting objectives that direct the organization toward overall goals.

Purposes of education related to standard of living and quality of life are employment, energy, environment, health, human rights, income, infrastructure, national security, public safety, recreation, and shelter. These variables serve as proxies for the concepts of standard of living and quality of life and allow me to make determinations about the values school board trustees/superintendents hold with regards to standard of living and quality of life.

Values are those conceptions of the desirable which motivate individuals and collective groups to act in particular ways to achieve particular ends. They reflect an individual's basic motivations, shape attitudes, and reveal the intentions behind actions (Begley, 1999). The values investigated in this study are the personal and professional values of superintendents and trustees, and the values of the school board as expressed in official documents.

Decision making within the bureaucratic model posits key attributes for the management of any organization: Intuitive methods of decision-making and scientific method based on observation and analysis were used to align decision making to narrower descriptors of "resource allocation" and policy-making (Calvert-Henderson, 2000).

Semi-structured interviews were conducted (Creswell, 2003). The qualitative method evokes questions about the validity and reliability of the interview guide. This study, therefore, relied on face validity which questions whether the results appear to fit the reality. The nature of this study is such that it is unlikely that another researcher using the same data would come up with exactly the same interpretation of the facts. In this context, reliability is viewed as consistency of response, and the ability to obtain similar results by documenting what the participants express about quality of life and standard of living (Creswell, 2003).

The interviews were based on seven questions and a pre-interview paragraph. The pre-interview paragraph was used to make the subject feel comfortable and understand the parameters/concepts to be discussed. For example,

Good morning/afternoon, the so-called knowledge economy has brought many changes in the world, which include economic and social issues. One could say that standard of living and quality of life are important concepts to be addressed. That is, reconciling the economic and social goals of education, preparing people for making a living and living a life. Therefore, as an educator, how does one think about how to address not only making a profit and providing value for money but also ensuring human value, character, community and democracy, that is values for the greater good.

The interview questions along with definitions of the terms were explained before the interviews began. Interviews were tape-recorded, with permission of participants, and some notes were taken during the interview but most notes were written after the interview. During the interview, each participant was given a glossary which consisted of definitions of the variables of quality of life and standard of living and a list of the variables. This glossary of terms (variables) was used by participants to assign level of importance to each variable. Upon completion of each interview, the data were transcribed from tape recordings word for word. These verbatim transcripts were the research data. The researcher carefully and meticulously took field notes to record perceptions, attitudes, and values expressed. Once the data were organized and transcribed, they were sent to participants for review. All participants reviewed their transcripts and recommended no major changes. Documents and artifacts were analyzed from various official documents such as vision statements, official policy documents, websites, programs and recorded minutes of board meetings. Each document and artifact was studied and analyzed using content analysis. Key words were extracted from the documents and artifacts and matched with the conceptual framework to develop a count of how many times quality of life and standard of living descriptors were used.

The themes of the study were drawn from the data sources described earlier, and related to that part of the conceptual framework that dealt with the benefits of education (the outer most ring of the conceptual framework), which consisted of thirteen indicators, those indicators are: human rights, shelter, energy, health, recreation, employment, technology, environment, income, public safety, technology, national security, and infrastructure.

RESULTS

The data show that both quality of life and standard of living had consistencies and inconsistencies between and within school boards, as between professional and personal roles, and as defined within the framework of purposes of education. For example, when asked about the purposes of education, superintendents valued quality of life more than standard of living. Superintendents looked at education as a means of creating citizens that were part of the democratic process. One superintendent said, "Part of the reason our school system exists is to make sure students understand and take part in their civic responsibilities. They need to know what democracy is and, how to function in our society."

Another superintendent considered quality of life to be about the happiness of the individual, whether that is by learning something new, experiencing another culture, or how well a life is lived, adding that it all depended on the subjective nature from individual to individual. This superintendent noted that quality of life flows from standard of living. For example, if one is happy in a career, then quality of life follows. "Quality of life issues are non-monetary factors that will impact families. We as a school district need to be aware of the power of quality of life."

Superintendents valued certain quality of life indicators, specifically recreation and human rights. Although they spoke of the importance of employment/income, they focused on the importance of quality of life for the purposes of education. They moved away from commerce and spoke more of community; they remarked less on private interest and more on public life. They looked at globalization more positively than trustees and commented that schools must strike a balance between education for making a living and educating for living a life. They felt that one of the greatest threats to a young person's life is the fundamental nature of human character and added that the qualities of good work are not necessarily the qualities of good character. They felt that the real challenge for schools was to tie educational goals to context and to recast the purposes of education by connecting private and personal goals to intellectual, civic, and moral values. They added that schools are subject to so many competing pressures that unless they are able to set some clear goals, they run the risk of trying to move in so many different directions at once that they make no progress in any of them. The professional and personal values of superintendents were not consistent.

Trustees mentioned the dual role schools play in terms of education for jobs and education for citizenship. Participants felt it was hard to satisfy all members of society. One trustee said, "Our students should learn that quality of life is about cooperation, as well as social and individual harmony, exactly the opposite of what standard of living promotes in today's economic climate."

In general, the trustees expressed their main priorities as employment/income, recreation, health, and human rights. Repeatedly, the data reflected the trustees' primary regard for the individual and private benefits of education. Trustees expressed the importance of employment/income and the need for the educational system to prepare young people for employment and financial success. They also talked of the pragmatic and utilitarian role education should play in a student's life, and goals relating education to individual and private gain. That is, education was valued for its material purposes; jobs, income, and social status. They were strongly influenced by personal values and external influences. The data showed that trustees have an understanding of the global context, and feel that the world was getting more complex and changing rapidly. They felt that school boards needed to be better and quicker at making decisions that were timely and relevant. Many participants were overwhelmed by the pressures for change within their organization, to the point that schools were extending their purpose beyond what they should be doing. Most felt there was a danger of making schools accountable for social and economic problems that are really other people's responsibility.

Trustees talked at great length of globalization as an important factor that has brought change to people's lives. They felt that globalization was a matter not only of opportunity to increase standard of

living, but of moral responsibility to protect quality of life. Trustees felt that the challenges for school boards in today's environment were about how we should live our lives and for what kind of life we should be educating young people. Furthermore, the professional and personal values of trustees were consistent.

In terms of interpersonal values conflict, superintendents had difficulty in reconciling their personal and professional views, whereas trustees did not. For example, one superintendent said:

In my position I have to value quality of life issues like human rights and healthcare, even though the focus is on standard of living. I think standard of living is imposed on us, we as a society have no control over it, let's be serious about it.

Another superintendent was even more direct with her conflict between quality of life and standard of living:

Being a superintendent, at times, means minimizing my personal perspective and maximizing my professional role. Although this is difficult to do, I have learned to balance both perspectives; that has been the most difficult challenge in my role as superintendent.

From the perspective of their role as superintendents, they felt that they had an active role in school board decision making and added that the traditional role of governance, based on the private corporate model, did not apply to school boards since education is very political. They felt their role was more closely tied to political broker rather than manager, supporting various priorities and policies that were constantly shifting, intersecting, and contradictory. It was evident from the data that there was a relationship between fact and value, not a separation. This was an interesting revelation because superintendents' practice was not completely pragmatic and unreflectively focused on procedural matters, but rather had a strong influence from their personal values which, at times, conflicted with organizational values. This would suggest from previous research that personal values can be important influences on superintendents even though they may be less frequently articulated by superintendents (Begley and Johansson, 1998).

Results also uncovered the contentious and conflicting nature of educational goals as expressed by superintendents and trustees. Both groups of superintendents and trustees commented on the importance of standard of living and took the human capital approach to explain the link with education and income, that is, both groups shared some common elements of quality of life and standard of living. Although respondents some had concerns about official educational goals, for instance one superintendent said:

Our education system today, more than any other time in our history, is looked upon to meet many different challenges. I don't know how we can meet all of them; our system is all over the place, trying to satisfy as many economic and social issues as possible.

In contrast, a trustee noted:

Schools can only do so much, we cannot be all things to all people, one area that we can make a difference in is providing the necessary attributes to cope with the many challenges in life.

Although the results demonstrated the contentious nature of educational goals, the participants were aware that official school board documents capture all elements that were not expressed by their personal and/or professional views. Most of the participants referred to official school board policies and plans when they lacked a sufficient response to quality of life and standard of living goals. For instance, one trustee said: "Our school has programs that range from apprenticeship and technology to safe school and energy programs. We have all aspects of life, whether it be in the economic or social realm."

The official documents showed the multifaceted nature of policies, plans, and priorities of each of the school boards. They recognized almost all of the indicators of qualify of life and standard of living. The most valued indicator was income/employment (standard of living), followed by health, human rights, and recreation. The four school boards' official documents, with the exception of shelter, touched on all aspects of quality of life and standard of living. Employment/income, health, safety, and human rights were the most frequently discussed in the official documents. The next most discussed were infrastructure/technology, recreation, and environment/energy.

Consistency existed among school board documents with respect to their plans, priorities, policies, programs, and Administrators' perceptions of quality of life and standard of living. The scope of the plans, priorities, and policies were wide enough to capture all the indicators of quality of life and standard of living. Therefore, the multifaceted nature of the school board made it easy to identify overlaps with the perception of administrators. Although the school board captured all indicators within their plans, priorities,

policies, and programs, the most prominent during the 2006-07 school year were employment/income, health, safety, and human rights. In general, the data showed that there were divergent perspectives about which quality of life and standard of living indicators were valued by administrators and those valued by the various school boards

In general, the indicators from the conceptual framework were used to match the frequency and attention each school board gave to each of the indicators related to quality of life and/or standard of living. Administrator values showed wide variations across and within school boards on some indicators of quality of life and standard of living and similarities on others. In general, trustees showed greater alignment between personal and professional values than did superintendents. In addition, superintendents valued quality of life indictors; whereas, trustees valued standard of living.

The results suggest that superintendents valued quality of life more than standard of living and, conversely, trustees valued standard of living more than quality of life. For instance one trustee remarked:

If we do not keep investing in our education system we will keep falling behind, I mean look at the global economy, China and India are quickly becoming more and more competitive, we have to do something now, our standard of living is in jeopardy.

Whereas superintendents expressed the current dilemma from a quality of life perspective:

A function of the school board is the notion of belonging. Feeling like an outsider is painful. It can happen to immigrants, the poor and even our students. I believe it's important to identify with and share in a community story and our schools do this and in fact must do it.

Although the data did show diversity in the views of superintendents and trustees about quality of life and standard of living, much of what they expressed was captured in various school board vehicles such as priorities, plans, policies and programs. In addition, the multifaceted nature of these vehicles within school boards allowed both trustees and superintendents the opportunity to champion indicators within standard of living and quality of life that they considered important from their roles, which may explain the divergence among administrator priorities and those of the school board.

There are some consistencies that are apparent between the school board, the trustees, and superintendents but there are also inconsistencies between both the role and board. The study showed the areas in which trustees and superintendents had variation in their perspectives about quality of life and standard of living with the official documents of the school board. Furthermore, areas in which trustees and superintendents had variation in their perspectives about quality of life and standard of living with the official documents of the school board was also apparent from the results. The data also showed that where trustees' value standard of living the corresponding gap is filled in with superintendents' value of quality of life.

A final finding of the study revealed that smaller school boards, in terms of student population and budgets, offered fewer programs for their jurisdiction than larger school boards. Smaller school boards offered more programs related to standard of living rather than quality of life; whereas, the larger school boards offered a mixture of both quality of life and standard of living. This implied that the larger school boards had the financial and staff expertise to offer both quality of life and standard of living programs; whereas, the smaller school boards offered standard of living not only because of inadequate financial resources but also because most of their students left the community for employment related issues and, therefore, the school board made it a priority to focus on the economic aspects of well-being as opposed to the social ones.

This research into the purposes of education has shown that in the perceptions of school board superintendents and trustees, increasing economic and material well-being does not necessarily improve well-being; instead, the study has shown that quality of life is seen as a major purpose of education more by superintendents than by trustees. Well-being is more than making money, and even more than just happiness. Well-being means developing a person, being fulfilled, and making a meaningful contribution to the community.

DISCUSSION

The first area in which this study contributed to knowledge in educational administration is in the area

of espoused values and underlying basic assumptions. Examining both espoused values and underlying assumptions may reveal much about why advocated educational goals are seemingly unattainable in certain school boards (Leonard, 1999). Moreover, if espoused values eventually get "transformed" (Schein, 1984) into underlying assumptions, then they are the precursor to understanding the process of how particular values become part of the educational landscape. Examining, analyzing, and describing organizational members' value orientations, variations in value orientations, and value conflicts pertaining to educational purposes are important steps in increasing our understanding of this phenomenon, thereby, narrowing the gap between value theory and educational practice.

The findings suggested educational goals are in conflict and not clear in a rapidly changing environment and, as a result, school boards are expected to deliver outcomes with unclear and competing expectations (Cuban, 2004; Kelley, 1997). The diversity and richness of opinions offered by administers are indicative of the complexity and nature of governance within educational organizations such as school boards. This was apparent in the conflict held by trustees and superintendents with their views on standard of living and quality of life. School boards in this study sought to overcome these conflicts by having a "big-tent" approach, that is, grand statements derived from official documents to include all community members. By developing these broad official statements, school districts would not leave any stakeholders out of their vision.

The research revealed that administrators had intrapersonal value conflict between their personal and professional values; whereas, trustees had no intrapersonal conflict between their personal and professional values. This conclusion may be related to the fact that trustees were making decisions based on both personal and professional knowledge and experience, and were being more genuine in their roles. Superintendents were somewhat more constrained by their roles, and the need to project congruency with their professional values and their school board's official position, even in cases where it may have conflicted with their personal values. According to Hodgkinson's (1978) framework and, that is, trustees used transrational, subrational, and personal good values while superintendents used rational and expert values.

The dual nature of the purposes of education, whether it is quality of life or standard of living, creates conflicting opinions among superintendents and trustees even though official policies, plans, and programs have been formulated and implemented. The study's results were consistent with the findings of other studies in expressing the difficulty in evaluating the quality of life or social benefits of education (Wolfe & Haveman, 2002). The study showed that trustees and superintendents had a difficult time unravelling both terms let alone trying to figure out how to measure each concept (McMahon, 2006).

Finally, the study unraveled the personal and professional conflict of values in the role of superintendent and trustee. Begley (2000) states that more research needs to delve below the surface of administrator practice to discover the intensions that motivate the adoption of particular values under particular circumstances. The multiple goals of education as seen from the analysis of the official documents of the school boards suggest the challenges school boards face in formulating purposes and policies to cope with a changing world, which could be attributable to the demands of cultural pluralism and economic ideology. The data showed that externally driven events matter, the school board, trustees, and superintendents defined it differently. The school board is left to capture the elements that individual parts of the system may not value or may have overlooked in the multiple goals perspective which characterizes most school boards. School boards have many social, political, and economic issues to confront. Furthermore, the planners within these school boards have the distinct and "interesting" challenge of a public trust that instructs them to preserve and communicate the values of society and yet, at the same time, to be on the forefront of educational, social and technological change (Foster, 1986). Many years earlier, Sergiovanni and Carver (1980) described the presence of a "web of tension" in the work lives of educational managers. School boards seem more preoccupied with maintaining the system rather than dealing with quality of life and standard of living. School boards seem to be torn in so many different directions that it would seem that they have no commitment to anything in particular. The result of this is that school board goals, priorities, and policies are being replaced by "emotivism," passing preferences rather than enduring values.

CONCLUSION

The general purpose of this study was to explain the value of quality of life and standard of living as

reflected in the purposes of education, and demonstrated by educational policies, plans, and administrator values at the school board level. In addition, the study explored the significance of values pertaining to the purposes of education from the perspective of educational leaders. The study also examined values embedded in policies, plans, priorities, and educational leaders' perceptions in order to understand the configuration between educational planners' philosophical beliefs and practices. Finally, the study investigated the consistency between school board plans, priorities, and administrator perceptions in terms of goals of quality of life and standard of living.

School boards in Ontario, in practice, contain multiple realities that are both externally driven and internally defined. These multiple realities may be characterized using standard of living and quality of life indicators as used in this study. The organizational variation in the indicators presented in the conceptual framework, among society and/or school board organizations within society, should be studied further. First, the structure of school boards should be studied in conjunction with externally driven trends, events, and opportunities to determine how school boards define and value such situations and incorporate them into policies, plans, and priorities.

Secondly, the study dealt with the value of education and its importance to economic and social value. Typically, most of the research in this area focused on market outcomes, particularly labour market returns, internal rates of return that compared earnings with the costs of schooling, both direct costs such as tuition and opportunity costs. Haverman and Wolfe (1984) and Wolfe and Zuvekas (1995) have studied the nonmarket effects of schooling. Some examples of nonmarket effects are better health, lower crime, and greater civic and community participation, to name but a few. More research could be done by using the quality of life and standard of living indicators to better measure the rates of return from education investments from a holistic perspective and/or sector based perspective. This type of research could further enhance the need to fund public education because it could demonstrate the value of education by using value for money based on the returns from both the market outcomes and non-market outcomes. The key for future research is the importance of demonstrating the linkages between education policy and economic and social policies.

Further studies could be advanced in regards to values and opinions about the purposes of education from other education systems. For example, investigating the purposes of education from a private school perspective, related to public and private benefits of education, individual goals versus public purposes and other issues related to public and collective values associated with conceptions of education, including the moral, civic, and intellectual elements and the promotion of equity. This type of research could be useful ultimately by showing the role of education is much more broad-based than just emphasizing job-ready skills and the skills employers want to the exclusion of other competencies.

In studying the role of decision making amongst school board trustees and superintendents, further research could be developed on external constraints on decision making. Policy, program, priority, and strategy issues revealed in this study the perceived limitations to decision-making latitude which related to the uncertainty on trustees' part about the boundaries of their roles. Examples of external constraints that could be studied are provincial and local rules and regulations funding, accountability, lack of information and planning tools, legal issues, and structure of the board.

Examining both espoused values and underlying assumptions may reveal much about why advocated educational goals are seemingly unattainable in certain school boards (Leonard, 1999). Moreover, if espoused values eventually get "transformed" (Schein, 1984) into underlying assumptions, then they are the precursor to understanding the process of how particular values become part of the educational landscape. Examining, analyzing, and describing organizational members' value orientations, variations in value orientations, and value conflicts pertaining to educational purposes are important steps in increasing our understanding of this phenomenon, thereby, narrowing the gap between value theory and educational practice.

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INVITATION TO SUBMIT MANUSCRIPTS

The editor of *Educational Planning*, a refereed journal of educational planning issues, invites the submission of original manuscripts for publication consideration. *Educational Planning* is the official journal of the International Society for Educational Planning. The audience of the journal includes national and provincial/state planners, university faculty, school district administrators and planners, and other practitioners associated with educational planning.

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Manuscripts preferred for inclusion are those from practitioners, reports of empirical research, expository writings including analyses of topical problems, or case studies. Unsolicited manuscripts are welcomed.

The following criteria have been established for the submission of manuscripts.

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