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EDUCATIONAL PLANNING

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From the Editors

We are pleased to welcome our readers to the fall 2026 issue of our journal, which brings together diverse perspectives and innovative research from scholars across different countries. Addressing key challenges in educational policy, planning, reform, and sustainability, this issue explores how research can inform educational practice and contribute to meaningful improvements in education systems. The contributions cover a broad range of timely and significant topics, including collaborative curriculum design, Erasmus exchange programs, effective planning and implementation in teacher education, budget cuts in special education, and the appointment of academic staff at universities. By examining these issues from different perspectives and engaging with practical challenges, the articles offer valuable insights into the complexities of educational policy and practice. Collectively, they underscore the importance of evidence-informed decision-making, effective planning, and context-sensitive approaches to educational improvement. As a journal committed to advancing international education, fostering educational reform, and promoting sustainable education systems, we remain dedicated to providing a platform for critical inquiry, scholarly dialogue, and the exchange of ideas across national and disciplinary boundaries. We hope that the studies presented in this issue will stimulate further discussion, inspire new research, and support educators, researchers, and policymakers in addressing the evolving challenges facing education today. We extend our sincere gratitude to all the authors for sharing their research and insights, and to our valued colleagues who have contributed their time and expertise through the peer-review process. Their commitment and collaboration are essential to maintaining the quality and integrity of our journal. We also thank our readers for their continued interest and engagement, and we hope that this issue will offer both fresh perspectives and practical inspiration for advancing education worldwide. We invite scholars, researchers, and practitioners to submit their research, theoretical contributions, and case-based studies for consideration in forthcoming issues of the journal.

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From Mental Models to Shared Artifacts: AI as a Catalyzing Tool in Collaborative Curriculum Design

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Abstract

Collaborative curriculum design teams carry complex mental models of what a program should become, shaped by professional experience, institutional context, scholarly knowledge, and personal beliefs. Without a shared external artifact, teams cannot compare, test, or reconcile those models, and progress may stall. Drawing on Schön's (1983) reflective practice, Vygotsky's (1978) zone of proximal development, Heifetz and colleagues' (2009) productive zone of disequilibrium, March's (1991) exploration-exploitation framework, and Kotter's (1996) momentum through small wins, this conceptual article uses theoretical synthesis to explain when and why AI-generated drafts move teams from stagnation to decision-making. As a phase-specific resource, AI is most valuable during exploration, unable to replace the contextual judgment and stakeholder relationships exploitation requires. As a mechanism, AI externalizes team thinking through relationally safe, revisable artifacts, without the relational cost of a colleague's draft being evaluated. As a source of momentum, each draft acts as a small win sustaining effort where discussion cannot. As a force bounded by a productive zone, AI-generated work must stay feasible for students and tolerable for the faculty producing it. We illustrate these principles through our experience redesigning Western Kentucky University's educational administration preparation program, offering a transferable framework for curriculum teams.

Keywords: educational administration preparation, curriculum design, artificial intelligence, principal preparation

Introduction

Curriculum design, like other change efforts, often follows a predictable pattern. After early enthusiasm and agreement on the need for change, faculty teams frequently find themselves mired in what Belsky (2018) calls the "messy middle." They meet regularly, exchange good ideas, yet struggle to produce anything concrete. Godin's (2007) description of "the dip" captures a related phenomenon: the period between the celebratory beginning and the visible progress where teams are vulnerable to stagnation. This experience is not unique to a particular institution or program type. It is a feature of collaborative curriculum work, arising from diverse stakeholder priorities, competing institutional purposes, cultural and bureaucratic resistance, and the difficulty of externalizing complex mental models into concrete, evaluable artifacts. This article offers a theoretical perspective on how artificial intelligence (AI) can interrupt stagnation by quickly externalizing team mental models and providing artifacts to which a stuck team can react. For this work, we define stagnation

as a state in which a team's iterative process stalls and, despite ongoing discussion, no new options surface and no progress is made in furthering mental models. This differs from the normal iterative, reflective, and recursive cycling of collaborative design, in which each cycle advances the curriculum framework or specific artifacts. Stagnation is iteration without progress. The team cycles through the same decision without offering anything new to build on. We integrate complementary theoretical frameworks and draw on our experience redesigning Western Kentucky University's (WKU) educational administration programs (EAPs), where a faculty team faced this impasse during a grant-funded redesign with external accountability benchmarks. Rather than treating AI's role in curriculum work as generating student-facing tools or developing discrete, final curriculum resources, this account offers an integrated theoretical explanation of how AI supports collaborative decision-making. We theorize a particular moment in collaborative curriculum design, when faculty expertise is high, yet progress stalls, and explain how AI-generated artifacts can serve as temporary scaffolding to restore momentum.

The Complexity of Collaborative Curriculum Design

Understanding why teams stall requires examining the complexity of curriculum design itself. Designs, by definition, "attempt to project a theoretically based pattern of experiences as desirable" (Macdonald, 1971, p. 199), a complex process in higher education. The complexity emerges from numerous intersecting factors, including competing purposes, diverse stakeholder needs, relational demands, institutional culture, and bureaucratic structures. Curriculum design teams engage stakeholders who prioritize academic, vocational, and societal goals differently, and these tensions surface in every curricular design decision. Competing purposes, divergent priorities, and layered stakeholder expectations do not, on their own, resolve into a common vision. Studies across international borders, including Australia (Yang, 2025), the Netherlands (Vreuls et al., 2025), four African countries (Alexander & Hjortsø, 2019), Finland (Annala & Mäkinen, 2017), and the United States (Oliver & Hyun, 2011), agree that design teams must establish a shared vision before they can effectively negotiate meaning and move forward together. The need to engage diverse stakeholders, as required by contemporary frameworks and accreditation expectations (Council for the Accreditation of Educator Preparation [CAEP], 2021), increases the complexity of curriculum design. Participatory stakeholders often include instructors, subject-matter experts, administrators, current and former students, employers, and other partners, with each adding another layer of expectations (Alexander & Hjortsø, 2019), but the messiness is purposeful, as each stakeholder voice articulates the same challenge through a different set of priorities. Participatory processes improve curriculum quality and relevance, build ownership, and surface knowledge faculty alone cannot provide. Co-designing a curriculum with industry practitioners enriches it with a broader range of sector-specific expertise and strengthens relationships between the academic program and professional communities (Cossham & Irvine, 2021). The richness generated by participatory processes is inseparable from the friction they produce, making shared external artifacts necessary. When each stakeholder group refracts design challenges through a different spectrum of priorities, abstract discussion alone cannot produce resolution. Without a shared object, testing, revising, and synthesizing competing mental models may become an insurmountable challenge. The polyphony of legitimate voices requires a score everyone can read.

Successful, participatory processes are dependent on relationships and mutual engagement. Vreuls et al. (2025) specified teamwork as one of six interdependent factors essential to responsive curriculum development. The iterative nature of curriculum work can lead to sustainability challenges for participants expecting a more linear, structured process (Cossham & Irvine, 2021; Yang, 2025).

Translating initial engagement into sustained contributions requires task clarity, competence, and motivation (Cossham & Irvine, 2021). These tensions require relational infrastructure: norms, trust, facilitation capacity, and protected time. When competing timelines, external accountability demands, or the sheer density of stakeholder expectations strain this infrastructure, even well-functioning teams can circle without forward movement. Whether the relational infrastructure can develop at all depends heavily on institutional culture. Historically, higher education faculty culture has prioritized research productivity over teaching and curriculum work. University policies and culture around program review and improvement can lead to either ritual compliance (Yang, 2025) or a collective investment in program redesign (Oliver & Hyun, 2011; Wolf, 2007; Yang, 2025). Vreuls et al. (2025) identify foundational conditions for responsive curriculum design: flexibility, adequate resources, and a willingness to change. Including stakeholders with diverse professional and lived experiences may surface questions about whose knowledge counts and whose experiences are centered, potentially disrupting disciplinary traditions and requiring institutional flexibility to navigate productively (Alexander & Hjortsø, 2019; McConlogue, 2020; Oliver & Hyun, 2011).

Cultural resistance to curriculum change is further entrenched by the bureaucratic structures through which curricular proposals must pass, with internal and external regulatory requirements limiting what is possible (Cossham & Irvine, 2021). Higher education governance systems typically require extensive approval processes involving committees, senates, accrediting bodies, and external regulatory authorities; these processes can span months or even years and often function as a conserving force even when individual faculty are genuinely motivated to change. Yang (2025) described navigating a multi-layered institutional review system that required submitting 103 revision documents over 18 months. These rigid requirements can create tension or stagnation in participatory curriculum development (Alexander & Hjortsø, 2019) by limiting the committee's agency. Vreuls et al. (2025) found expert participants rated agency as the most important and least feasible factor in responsive curriculum development. The curriculum development literature documents the complexity of the problem, but it fails to address the moment of stagnation itself, when a team is circling without moving forward. Vreuls et al. (2025) invoke Whitehead and colleagues' (2013, as cited in Vreuls et al., 2025) image of a carousel of ponies in which curriculum problems reappear while institutions address symptoms rather than structural causes. The literature offers cultural, sequential, and systemic guidance, but it has not theorized the specific moment when those conditions, processes, and structures are in place, and progress still stops.

Curriculum Complexity in Educational Administrator Preparation

Curriculum design in EAPs inherits the pressures described above and adds several field-specific ones. Meaningful program improvement requires the sustained participation of a diverse team, including program faculty, affiliate instructors, field supervisors, district-level administrators, education service center staff, and program graduates, each contributing knowledge (Arzu et al., 2023). Each voice refracts the design challenge through a different spectrum of priorities, and holding the polyphony while moving toward a coherent curriculum is itself a distinctive pressure of the field. Programs must also design for candidates who arrive with vastly different professional expertise, some with deep instructional knowledge and others with strong organizational management skills, entering from rural, suburban, and urban school contexts differing substantially in resources, community expectations, and leadership demands (Darling-Hammond et al., 2022; Leggett et al., 2023; Orr, 2011). Legal and ethical constraints further complicate matters: FERPA, IDEA, and personnel confidentiality mandates restrict candidate access to precisely the high-stakes decisions most central to principal practice (Cosner, 2020; National Policy Board for Educational

Administration [NPBEA], 2018; Pannell & Sergi-McBrayer, 2020). Programs aspire to authentic preparation, but the law draws a hard boundary for faculty to navigate in every course and learning assessment.

The breadth of what programs must cover adds yet another layer of complexity. Coherence alone requires aligning 28 National Educational Leadership Preparation (NELP; NPBEA, 2018) standard components or 10 Professional Standards for Educational Leadership (PSEL; NPBEA, 2015) across courses, clinical experiences, and assessments while avoiding redundancy and ensuring sufficient depth, a challenge intensified by program size, faculty autonomy, and course diversity (Cosner, 2019; Leggett et al., 2023; NPBEA, 2018; Young et al., 2017). Each decision point surfaces a new dimension of competing expectations: which standards take priority, how deep is deep enough, and whose definition of equity shapes the curriculum. These questions seldom have consensus answers. Faculty carry these questions into design meetings as complex mental models shaped by professional experience, scholarly knowledge, and core beliefs.

These pressures can lead to gaps between what programs espouse and what their curricula enact. Little et al. (2024) documented this pattern in a national study of UCEA-affiliated programs: although 96% of faculty identified early childhood leadership preparation as important, only 4% of programs required a course focused entirely on child development or early childhood education. Reasons given for this disconnect included time constraints, limited faculty expertise, the absence of licensure or accreditation levers, and the lack of a common pathway for embedding the content. Similar dynamics extend into equity preparation. Spooner (2024) found Ontario principals attributed their equity orientation to prior teaching experience rather than formal preparation, describing program equity content as surface-level and performative. This gap matters because candidates who encounter surface-level, performative equity content are unlikely to develop the dispositions required for equitable leadership (Guillaume et al., 2020; Khalifa, 2018). Each of these pressures (e.g., candidate and contextual diversity, authentic learning limits, breadth of standards, and equity gaps) surfaces different dimensions of competing expectations. Each brings a different set of mental models. Programs must negotiate competing stakeholder definitions of quality, bridge persistent gaps between espoused priorities and enacted content, design for a wide range of candidate preparation levels, and ensure equitable access to clinical experience across diverse contexts (Arzu et al., 2023; Goldring et al., 2025; Shapiro et al., 2025). Traditional lecture-based and case-based designs only partially approximate the adaptive, real-time decision-making demands of the principalship (Cosner, 2020; Davis, 2016). When the design challenge is this multidimensional, the absence of shared external artifacts may slow progress or make it structurally impossible because there is no common object against which the polyphony of competing demands can be heard, tested, and resolved. It is this gap, between clearly articulating ideas and designing the concrete curriculum structures needed to reach them, that stalls design teams and motivates the framework we develop in this article.

AI in Curriculum Planning

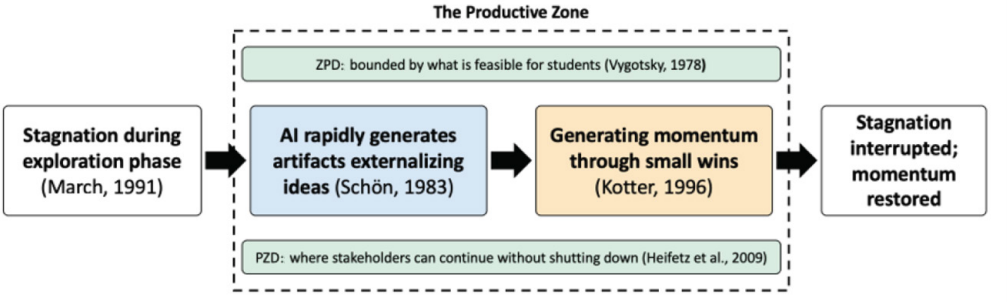
What faculty teams navigating this complexity need is a mechanism to make their collective thinking sufficiently visible. AI has quickly entered educational planning conversations, and research is working to keep pace. Existing literature addresses AI's role in student-facing applications such as adaptive learning systems, personalized tutoring, and automated feedback on student work (De Laat et al., 2020; Ifenthaler et al., 2024). Ethical frameworks for AI use in education have also received growing attention, with scholars identifying concerns around autonomy, transparency, equity, and the risk of displacing rather than supporting human judgment (Holmes et al., 2022; Nguyen et al., 2023). Far less attention has been paid to AI's potential role in the faculty-facing work of curriculum

design itself. This gap matters because the challenges educational planners face in collaborative curriculum design may be more about externalization and momentum than access to information or content generation.

Emerging studies have examined AI use in discrete components of curriculum work, including the creation of student learning outcomes (Doyle et al., 2025) and the development of science units, rubrics, and quizzes (Cooper, 2023); no study has examined AI as a support tool across the full collaborative curriculum development process. Qian and Hassan's (2025) systematic review documents the expanding ecosystem of AI tools in instructional design but focuses on individual designer workflows rather than collaborative faculty teams navigating collective curriculum decisions. Liang and colleagues' (2025) systematic review similarly examines AI's impact on the curriculum-instruction-assessment triad but stops short of theorizing AI as a mechanism for externalizing shared thinking across a team. Research on rapid prototyping tools in design cognition demonstrates externalized artifacts, even imperfect sketches and drafts, function as thinking tools that make abstract problem spaces concrete and critiquable. This transition enables teams to move from problem definition to solution generation (Razzouk & Shute, 2012). Emerging scholarship on AI as a thought partner in professional work (Qian & Hassan, 2025) partially addresses these ideas but stops short of accounting for the relational and coordinative dimensions of faculty teamwork.

The theoretical framework developed in this article draws on these adjacent literatures alongside Schön's (1983) account of reflective practice, Vygotsky's (1978) framework for scaffolded learning, Heifetz and colleagues' (2009) adaptive leadership theory, March's (1991) exploration-exploitation model, and Kotter's (1996) theory of momentum through small wins to offer an account of the conditions under which AI can interrupt curriculum design stagnation. This synthesis addresses a gap in the literature by explaining why AI-generated artifacts can interrupt a stalled curriculum design process. Five complementary theoretical frameworks collectively explain how AI can catalyze collaborative curriculum design. Rather than offering parallel or interchangeable perspectives, each addresses a specific explanatory gap the others leave open, and together they form a layered account of the same phenomenon: the conditions under which externalized, revisable artifacts move planning teams from stagnation to productive action. The role of each framework is illustrated in Figure 1. We selected these five frameworks, rather than a single change-management or design-thinking theory, because no single existing framework addressed the four explanatory tasks in this work: establishing why externalization matters structurally, specifying when AI's contribution is most needed, identifying momentum as the observable effect, and defining the zone in which the contribution is both within reach and productive rather than overwhelming. A layered framework synthesizing multiple theories was needed. Together, these five frameworks offer what no single framework provides in isolation by identifying the moment of stagnation, defining the productive zone, and offering the externalization of ideas through AI-generated artifacts as the interrupter.

Figure 1. *AI as a curriculum design catalyst*



Note. This figure presents a conceptual model derived from theoretical synthesis; it has not been empirically validated. ZPD = zone of proximal development; PZD = productive zone of disequilibrium.

The Phase for Interruption

The stagnation described in this process must be located within a specific phase of the design process. March's (1991) exploration-exploitation distinction explains the phase-specificity of AI's utility. Exploration involves generating variations, experimenting with possibilities, and discovering alternatives. It requires flexibility, speed, and tolerance for imperfection. Exploitation involves refining chosen approaches, aligning with accreditation standards, and negotiating institutional constraints. It requires depth and precision only available through accumulated contextual knowledge. The phases overlap and recur throughout the design process. But their demands differ fundamentally, and AI's affordances align strongly with one and poorly with the other. Exploration rewards the speed and variation AI generates naturally; exploitation requires expertise and contextual judgment AI cannot generate. For educational planners, March reframes the central question from whether AI belongs in curriculum design to when.

The Mechanism for Interruption

Schön's (1983) concept of the reflective practitioner establishes why externalized artifacts are a structural precondition for productive design conversation. He described how designers use sketches to make thinking visible, not because the sketches are final products, but because they allow teams to react to something concrete. Schön (1992) suggested computer programs could enable designers to "see-move-see": to create prototypes quickly, capture changes in intentions, and identify unintended consequences. Three decades later, AI makes this externalization practically available to any faculty team. A team debating program structures in the abstract has no shared object to evaluate. A team reacting to an AI-generated draft, even a flawed one, has converted an internal disagreement into an external, workable problem. For educational planners, this reframes AI's value: it lies less in the quality of what AI produces and more in its capacity to give teams something tangible to think against. Design research corroborates the claim that externalized representations function as vehicles for thinking, enabling designers to react, revise, and discover new requirements through the act of making ideas visible (Razzouk & Shute, 2012).

The Effect Leading to Interruption

Kotter's (1996) theory of momentum through small wins addresses what the preceding frameworks miss: the self-reinforcing relationship between visible progress and sustained effort. In organizational change, incremental progress builds confidence and commitment to carry teams through difficulty. In curriculum design, the absence of tangible artifacts creates a specific momentum problem; teams can discuss indefinitely without experiencing the forward movement that makes continued effort feel worthwhile. AI addresses this by accelerating the production of revisable objects. A proposed program structure, even if the team immediately recognizes it as inadequate, is still progressing. It can be critiqued, revised, and replaced. Each such cycle is a small win in Kotter's sense and evidence the work is moving. For educational planners, this suggests treating artifact production as an explicit goal of early design meetings. Imperfect artifacts produced early generate more momentum than waiting until all decisions have been made to produce refined artifacts.

The Productive Zone for Interruption

Vygotsky's (1978) zone of proximal development (ZPD) explains the need to map boundaries of what is feasible in the student-facing aspects of curriculum design. The ZPD describes the productive space between what a learner can do independently and what exceeds capacity regardless of support. Learning happens in this gap. AI-generated drafts of possible assessments were sometimes too ambitious for full-time teachers participating in a part-time educational administration program. For example, assessments required candidates to design and implement schoolwide improvement systems within a single semester. Faculty discussion immediately surfaced an upper boundary related to students' sphere of influence, readiness, and resources. On the other hand, sometimes assessment drafts surfaced a lower boundary, often through a lack of authenticity. The productive zone became more visible only because both extremes were externalized.

Heifetz and colleagues' (2009) productive zone of disequilibrium extends this analysis into the motivational and affective dimensions of design work that Vygotsky's framework does not fully address. Too little challenge produces no impetus for change. Too much overwhelms the capacity to act. Productive design occurs between these extremes, where challenge is real but navigable. A faculty team whose discussions have grown increasingly abstract and inconclusive has likely drifted toward the overwhelmed end, not from lack of effort, but from the absence of a bounded, manageable task. AI-generated artifacts reframe the work (i.e., an open-ended design mandate becomes a specific set of decisions about a specific document). For educational planners, a practical diagnostic is this: when design conversations grow more abstract over time rather than more specific, the team needs a concrete artifact to re-anchor the work.

Taken together, these frameworks point toward a transferable principle for educational planners: when planning teams shift from productive struggle to complexity-induced stagnation, the most effective intervention is rarely more discussion. This synthesis of frameworks differs from existing accounts of AI in curriculum work. Qian and Hassan's (2025) review and Liang and colleagues' (2025) systematic review describes how AI is used within individual or team workflows once adopted; Cooper (2023) and Doyle et al. (2025) document AI's application to discrete curriculum artifacts. None of these theorizes the conditions under which AI's availability interrupts a stalled process in the first place. The present framework theorizes when and why AI intervention works, filling a gap in the current literature.

The Vignette of Practice

This framework draws on our experience redesigning Western Kentucky University's EAPs. Following Schön's (1983) concept of the "vignette of practice" (p. viii), a reflective account of practitioner experience used to surface and examine unspoken but enacted knowledge, we offer this context not as evidence for the theoretical claims we developed above, but as the concrete setting from which those claims emerged and through which they can be made visible. The vignette makes the principles we articulate tangible, but their relevance extends beyond this specific program.

The Impetus for Change

Following a 2024 Department of Labor grant to establish a principal apprenticeship pathway, the WKU curriculum committee faced an ambitious three-fold mandate: design flexible pathways, including full-time apprenticeships; create authentic, integrated assessments; and strengthen the operational management focus, all while maintaining program quality and meeting externally imposed benchmark deadlines. The grant pursued three interconnected goals: reduce alternative-route enrollment by providing high-quality traditional preparation, reduce principal turnover by improving preparation quality and fit, and increase day-one job readiness through authentic practice-embedded experiences. The redesign began with a faculty committee of three, which grew to seven as the work progressed. The committee met weekly over two semesters to design the programs and courses, followed by another two semesters to refine assessments and learning experiences, with summer retreats in between. The five-semester program required six credit hours of hybrid coursework each semester, moving students through foundational, instructional, systems-level, and operational management content before a clinical semester. The structure limited flexibility for working professionals, created artificial separations between interconnected competencies, and produced assessments that struggled to capture the integrated nature of authentic principalship. The redesign aimed to address these limitations through flexible pathways, integrated co-taught courses, and competency-based assessment. Specifically, a pre-apprenticeship pathway would allow partner districts to align their aspiring leader programs with university content for articulated credit; the program would shift from ten 3-hour courses to two 6-hour co-taught courses in the first year, with greater sequencing flexibility; and Level 2 coursework would focus more strongly on mentoring and clinical experiences.

Our Dilemma

Despite a faculty retreat in August 2024 and nearly a full semester of committee work, the team had made little tangible progress. Meetings featured rich discussions of program values, research on principal preparation, and the programmatic gaps between theory and practice. Faculty were aligned with goals and genuinely committed to the work. Yet the team consistently failed to commit to concrete artifacts. Three questions circled repeatedly without resolution: how to incorporate flexible pathways, how to integrate content delivery, and how to create more authentic assessments. The team faced what might be called a planning paradox characteristic of collaborative curriculum design: concrete options were needed to make informed decisions, but generating options required committing time and energy to specific directions that could not be chosen without first seeing concrete options to evaluate. This challenge may be a structural feature of value-laden design work, in which the very richness of shared expertise can make forward movement harder rather than easier. Faculty held detailed, sophisticated mental models of what the program should become. Those models lived entirely inside individual heads, with no fully articulated external form against which the team could react, agree, or productively disagree. This condition (sophisticated, shared expertise without shared external artifacts) created the opening for AI as a catalytic tool.

AI as a Catalyzing Tool

We recognized we could not evaluate curriculum structures existing only as abstract concepts in our discussions. Faculty conversations were generative but inconclusive. Discussions of program structure, course sequencing, and assessment philosophy produced shared understanding but no shared artifacts. Differences in how we approached the workflow led to divergent efforts and increased stagnation. The team lacked consensus on whether to remap the curriculum or build on prior curriculum work, leading to situations where faculty members debated next steps rather than moving forward. The grant-imposed timeline reduced patience for experimentation and the creative, unplanned events that naturally emerge in curriculum reform. The team was not using AI to create final content. Instead, we used AI as a catalyst for generating drafts we could discuss and evaluate, as illustrated in Figure 2. Faculty articulated their current thinking about a curriculum element (e.g., program structure, course titles, learning outcomes, or assessment frameworks), then asked AI to generate multiple options grounded in best practices and our specific context. Faculty reviewed AI outputs critically to identify strengths and limitations, then revised or rejected options based on expertise and institutional requirements. When AI-generated drafts entered the conversation, the nature of faculty discussion shifted. The team moved from debating possibilities in the abstract to evaluating specific options. The drafts were never perfect, but their imperfections generated productivity. Agreement on a proposed course title like "Catalysts of Learning" that would not survive institutional approval was a form of progress unavailable when course titles existed only as vague aspirations.

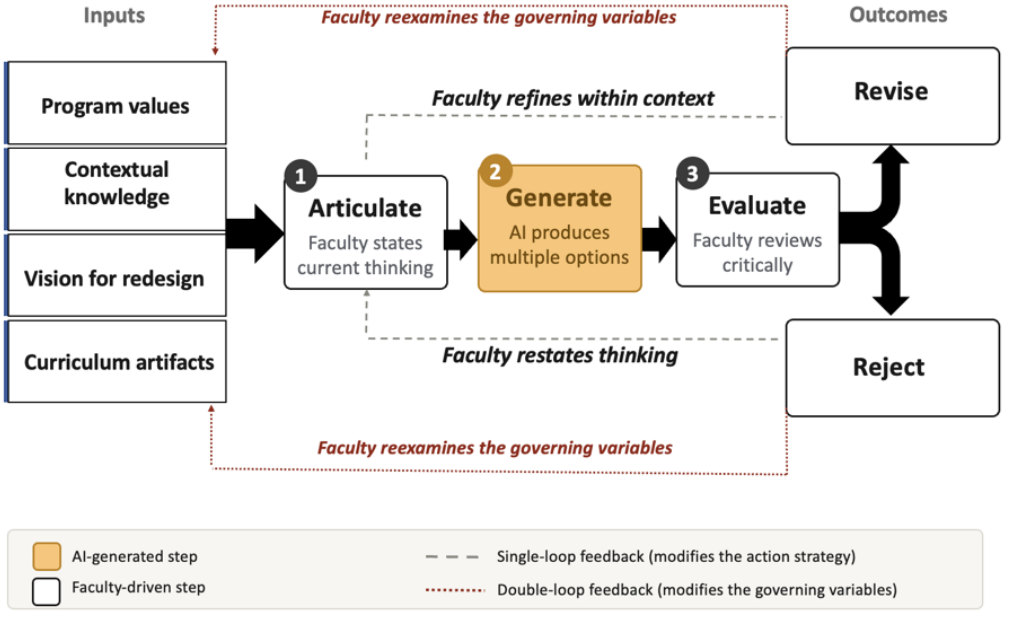


Figure 2. *The AI-assisted curriculum design cycle*

Note. This figure depicts a conceptual model of the design cycle derived from practice reflection, not an empirically validated process. Shaded steps indicate AI involvement; unshaded steps are faculty-driven. Dashed arrows indicate a feedback loop.

The process was iterative rather than linear, unlike previous curriculum efforts (Leggett et al., 2023). AI drafts revealed gaps in our thinking, prompting further dialogue to refine prompts and try again. Sometimes we rejected AI suggestions entirely but found rejection clarified what we wanted. Other times, AI suggestions pushed us beyond our current paradigms, even when we ultimately chose more pragmatic approaches. AI drafts also functioned as boundary markers. Assessments requiring candidates to design and implement schoolwide improvement systems within a single semester clarified an upper boundary of what was feasible given candidates' positional authority and time constraints. Drafts merely replicating existing course structures clarified the lower boundary. The productive design space became visible only because we made both extremes concrete. We employed AI across several curriculum design domains: program structure, course titles and descriptions, learning outcomes, standards alignment, and assessment frameworks. In each instance, AI output served as a starting point rather than an endpoint. Faculty expertise remained essential for evaluating quality, ensuring accuracy, and adapting to institutional and partnership contexts.

The value AI contributed shifted across the redesign phases. During the exploratory phase, as we were generating alternatives for program structure, course configurations, and assessment frameworks, AI's capacity for rapid variation was directly useful. It could produce multiple alternative credit-hour distributions, course descriptions, or pathways to competency-based progression in the time it would have taken the committee to agree on a direction for a single discussion. During the exploitation phase, when we refined selected approaches, developed artifacts for institutional approval, wrote final learning outcomes, and aligned assessments with standards, AI's contributions became peripheral. Faculty expertise, contextual knowledge of partner district needs, and familiarity with accreditation requirements drove those decisions in ways AI could not. Throughout, AI consistently pushed toward more innovative, sometimes impractical solutions, while faculty expertise pulled toward implementable approaches. This tension proved productive. For example, AI suggested using six two-hour courses, and considerable work went into designing deeply integrated micro-course experiences. During a faculty curriculum workday, a faculty member proposed two six-hour co-taught courses instead. The team quickly agreed, and a combination of AI and human effort produced the necessary changes. Similarly, AI learning outcome progressions requiring students to design, implement, and evaluate school improvement initiatives helped the team recognize both its aspirations and its constraints. These learning progressions pushed faculty to develop assessments requiring students to move beyond evaluation, while we still acknowledged full design-implement-evaluate cycles may be unrealistic for students not yet in formal leadership positions. Before AI entered the process, the team met weekly and produced nothing tangible. A proposed program structure, even a flawed one, gave faculty something to point at, argue with, and revise. Each revision cycle produced what Kotter (1996) would recognize as a small win with a sense of visible forward movement. Producing a revised course sequence, even though further revision was required, felt different from debating course sequences in the abstract. Momentum replaced stagnation. The proof of authentic faculty ownership lies in the final curriculum's origins: course names created by faculty, NELP standards alignment verified and corrected by faculty, assessment frameworks designed by faculty, and a pre-apprenticeship structure developed through partner conversations. This dynamic suggests curriculum design teams stalled in the messy middle may benefit less from better ideas than from concrete artifacts making the next decision possible.

Discussion and Implications

The WKU redesign experience surfaced a structural challenge. Our faculty team stalled because it lacked a shared external artifact to dissect. The five frameworks synthesized in this article each captured a distinct aspect of what happened, but they are not independent. They describe the same phenomenon from different angles: a team needing scaffolding found it in an unexpected place and used it to move forward. The following discussion draws out the implications of that experience for educational planners more broadly.

Externalization as a Structural Precondition

The most fundamental implication is one Schön (1983) identified decades before AI existed: productive design conversation requires something external to react to. Design cognition research across engineering, architecture, and industrial design confirms that externalized artifacts are a structural precondition for productive design work, not a stylistic preference (Razzouk & Shute, 2012). The WKU experience extends this finding to the specific context of collaborative faculty curriculum design. When thinking remains internal, agreement and disagreement alike stay vague and frustrating. The WKU experience adds a layer to this principle the literature has not previously named: when the design challenge is also polyphonic, a shared external artifact provides the surface on which competing mental models can be compared, tested, and reconciled.

This has practical implications beyond AI. Any mechanism that rapidly externalizes team thinking, such as a colleague's rough sketch, a borrowed framework from another program, or a deliberately imperfect straw proposal, can interrupt stagnation. AI's distinctive contribution is its availability at any point in the process, its capacity to generate multiple variations rapidly, and its tolerance for being wrong. When faculty critiqued and rejected AI artifacts, there was no relational cost. A draft course title suggested by AI and dismissed carries none of the interpersonal weight of a draft suggested by a team member and dismissed. This safety matters; it lowers the stakes of being concrete, which lowers the barriers to making thinking visible in the first place.

Matching Tools to Design Phases

A practical, consequential implication is March's (1991) insight that exploration and exploitation are fundamentally different activities requiring fundamentally different tools. For educational planners, the practical implication is the importance of when to use AI. If the team is generating and exploring, struggling to make abstract thinking concrete, AI offers genuine value. If the team is refining, executing, and aligning with specific institutional and accreditation requirements, human expertise is not merely preferable but irreplaceable. Matching tools to phases is as important as selecting tools in the first place. See Table 1.

Table 1. *Exploration and exploitation in curriculum design*

	Exploration	Exploitation
Goal	Generate possibilities	Refine and execute
Activities	Brainstorming, prototyping, mapping alternatives	Aligning standards, writing outcomes, seeking approval
Demands	Speed, flexibility, tolerance for imperfection	Depth, precision, contextual judgment
AI utility	High	Low
Human expertise	Provides direction and evaluation	Drives all decisions
Risks	Team circles without options to evaluate	Options adopted without contextual fit
WKU example	AI-generated course structures, titles, and assessment options	Faculty aligned NELP standards, written outcomes, and pathways

Note. Phases overlap and recur throughout the design process; this table represents their dominant characteristics. Adapted from March (1991).

Momentum as a Design Variable

Attending to artifact production as a deliberate strategy matters for educational planners managing curriculum design timelines. The goal of early design meetings may be less about reaching good decisions than about producing revisable objects that enable later decisions. Imperfect artifacts circulated early generate more momentum than refined artifacts produced late. When a design team's discussions grow more abstract than specific, the team does not need more conversation. It needs something concrete to react to.

A Transferable Principle

Taken together, these frameworks point toward a principle extending beyond AI and beyond educational administrator preparation: when a collaborative design team shifts from productive struggle to complexity-induced stagnation, the most effective intervention may not be more discussion. It can be introducing a low-stakes, revisable, concrete artifact to make thinking visible and disagreements productive. AI is one way to generate such artifacts quickly and without relational cost. Understanding why the AI-generated artifacts restored momentum through the lenses of externalization, scaffolding, disequilibrium, phase-specificity, and momentum gives educational planners a transferable framework for diagnosing stagnation and selecting interventions appropriate to their specific context. Rather than using AI to generate final products or even drafts, the most effective use may be providing temporary scaffolding, not permanent architecture. Considering AI-generated work as options for evaluation, not final solutions, promotes faculty thinking instead of replacing it. Like all scaffolding, the value is fully realized when it is removed. Educational planners outside the U.S. context should consider how institutional and cultural factors may shape the framework's application. Faculty governance structures, norms around collegial decision-making, and the relationship between preparation programs and accreditation bodies vary substantially. The underlying principle, revisable, externalized artifacts interrupt complexity-induced stagnation, is likely robust across these variations.

Limitations and Future Research

Honest scholarship requires acknowledging alternative interpretations of our experience. Was AI truly the catalyst breaking through our impasse? Or were we simply ready to move forward anyway, and AI permitted us to act? Perhaps we needed the time spent in "the dip," regardless of available tools, to clarify our thinking before moving forward. The truth lies somewhere between these interpretations. What we can say is AI-created models provided a concrete point for debate; we could "see" and debate the course visualization. When we realized we needed to shift our thinking about course sequencing, titles, or structures, we could pivot quickly without discarding our prior work. Whether AI was a cause or a catalyst may be less important than recognizing its utility for both roles.

The framework also rests on assumptions tied to our stage of work that future applications should not take for granted. We assumed shared values, vision, and purpose had already been defined, with consensus existing among stakeholders before AI entered the process. Teams without this groundwork may find AI generates noise rather than momentum. The mechanism itself carries a second assumption. We crafted the prompts and chose which of our prior artifacts to include, and that prior work carried varying levels of committee-wide commitment; this account cannot answer whose prompts and whose artifacts shape what AI produces. It also cannot completely shield feedback from possible relational repercussions. A third assumption concerns the diagnosis. The framework assumes a team can always recognize where it stands: stagnated, exploring, exploiting, or drifting toward the overwhelmed end of the productive zone. In practice, this judgment is harder than it sounds. What counts as the make-or-break moment to introduce an artifact, and when does building momentum begin to silence some stakeholders' voices rather than include them? Finishing faster is not the goal, and moving quickly through a design cycle to the finish line is not the same as a team learning quickly to improve the curriculum. Our experience occurred in a specific context: a small faculty team redesigning an existing program with clear external accountability, the Department of Labor grant. Several factors may limit generalizability. First, faculty possessed sufficient technical knowledge and willingness to craft effective prompts and critically evaluate outputs. Programs with less AI-experienced faculty, or faculty less willing to use AI, might encounter different challenges. Second, we were redesigning our program, not creating it from scratch; we were providing existing structures to refine rather than starting with a blank slate. Third, the grant provided external accountability and created urgency, which may have increased receptiveness to novel approaches. Future research should examine AI's utility in different contexts: larger curriculum committees, new program development, less urgent timelines, and varying levels of faculty AI literacy.

Another question for future research concerns prompting strategies to optimize AI's utility for curriculum design. Our success required iterative prompt refinement informed by deep knowledge of both our context and educational leadership principles. We developed prompts that provided sufficient context for AI to generate relevant options without constraining exploration. However, we did this through trial and error rather than a systematic approach. Research examining effective prompting strategies for curriculum design could identify patterns in successful prompts, common pitfalls in prompt construction, and principles for structuring human-AI interaction in design contexts. A linguistic analysis comparing structured and unstructured prompts, and prompts grounded in a program's prior artifacts with more open-ended prompts, could clarify which approach yields options faculty find genuinely usable and whether context-specific information produces different design outcomes than more open-ended approaches.

Next, how does the use of AI during design influence implementation quality? Our analysis focused on the design phase, but the ultimate test of any curriculum lies in implementation. Future

research should consider unintended consequences during implementation as well as student experiences in programs designed with AI support. While our focus was on faculty design processes, students are the ultimate beneficiaries of improved curriculum. Do students perceive differences between courses designed with and without AI support? Does AI use during design influence curriculum coherence, assessment authenticity, or learning outcomes from student perspectives? Student voice remains absent from our analysis yet is essential to understanding AI's ultimate impact on program quality. This question may be harder to study in some contexts; a principal candidate's eventual leadership impact plays out over years, and in schools the program does not control and may not have access to relevant data. A more tractable approach may be to compare key assessments before and after an AI-assisted redesign, or to conduct document analysis of de-identified student work samples produced before and after the redesign to see whether the artifacts themselves show a detectable difference.

Finally, does using AI in curriculum design influence faculty members' longer-term design practices? Does early experience with AI as a prototyping tool transfer to other design contexts? Do faculty who successfully use AI for curriculum design develop different design thinking approaches than those who design without AI support? Longitudinal studies examining how AI use shapes faculty development as curriculum designers could reveal whether AI functions as temporary scaffolding or becomes integrated into ongoing design practice. Our experience raises a related possibility worth testing: comparing faculty ownership and understanding of the resulting curriculum between those who actively crafted AI prompts and colleagues whose primary role was reviewing drafts and giving feedback. Future research could examine whether the depth of engagement with AI-generated drafts, not merely exposure to them, predicts faculty buy-in and implementation readiness.

Future work could also test the four-element model directly through a multi-site case study spanning several programs, observing and documenting when and how AI is introduced, tracking the specific artifacts AI produces, and recording when and why faculty revise or reject them. Such a design would allow the phase, mechanism, effect, and productive zone to be coded as they occur rather than reconstructed retrospectively, as this account has done.

Conclusion

This article has advanced four theoretical claims about AI's role in collaborative curriculum design. First, AI is a phase-specific resource: its contribution is bound to the exploratory work of generating and weighing options, not the exploitative work of refining and aligning them (the Phase). Second, the primary barrier to progress in faculty design teams is frequently not knowledge or motivation but the absence of shared external artifacts, the concrete, revisable objects that make competing mental models visible and productive dialogue possible (the Mechanism). Third, AI-generated drafts produce momentum as a direct effect, not a byproduct; each revisable draft functions as a small win that sustains effort where discussion alone cannot (the Effect). Fourth, that momentum has to stay within a productive zone: an artifact that is not feasible for students, or that overwhelms rather than challenges the faculty producing it, fails regardless of how quickly it was generated (the Productive Zone). These claims fill a specific gap in the literature: existing scholarship documents how AI is used once adopted (Liang et al., 2025; Qian & Hassan, 2025) or examines its application to discrete artifacts (Cooper, 2023; Doyle et al., 2025), but none of it theorizes the conditions under which AI's availability interrupts a stalled process in the first place. The five theoretical frameworks explain distinct pieces of this process. Together, they give planners a diagnostic lens they can apply in real time to decide whether a stalled moment calls for a concrete artifact. This synthesis, not any one framework alone, is the article's central theoretical contribution.

Based on these claims, we suggest a reframing for educational planners considering AI in curriculum work: the question may not be whether AI belongs in the process, but when. Collaborative curriculum design teams carry complex mental models of what a program should become, models shaped by professional experience, institutional context, scholarly knowledge, and personal beliefs. Those models cannot drive collective design decisions while they remain internal, and when the design challenge is also polyphonic, when each stakeholder voice refracts the same problem through a different spectrum of priorities, abstract discussion alone cannot produce a resolution. A shared external artifact is not a convenience; it is the surface on which competing mental models can be compared, tested, and reconciled. This reframing carries implications beyond the immediate case. For curriculum theory, it extends Schön's (1983) account of reflective practice to collaborative teams. In practice, it gives planners a diagnostic they can act on when design conversation grows more abstract and momentum fades; these signal the need for externalization of ideas.

If AI is introduced too early, before the team has articulated shared values, it generates noise without direction. If introduced at the right moment, when shared understanding exists but shared artifacts do not, it can move a team from conceptual stagnation to concrete action in ways no amount of additional meeting time reliably produces. For us, this moment came mid-process, in the gap between knowing what a redesigned program should accomplish and seeing what it might look like. AI did not close the gap. It gave us something to stand on while we closed it ourselves. This temporary support is what good scaffolding does, and like all scaffolding, its value lies precisely in its removal. As AI tools continue to improve, faculty may grow more skilled at directing them, and the tools themselves may grow better at responding to the specific context educational planners bring to them. This mutual adjustment could speed up how quickly programs respond to changes in the field. This reach depends on tracking all four elements together, not the mechanism alone. As AI tools change, the phase-specificity of their usefulness may shift; models capable of stronger contextual judgment could narrow the gap between exploration and exploitation. AI's value is not confined to the earlier phase; it is simply more beneficial there, given current tool limitations. The effect, momentum through small wins, will remain necessary regardless of how the tools evolve, since the problem it solves is relational and motivational, not technical. The productive zone will need continual recalibration: as AI-generated drafts become more polished, faculty will need to work harder to preserve the productive disequilibrium that a rougher draft currently supplies for free. The framework's durability depends on tracking these four elements as AI changes, not on the capabilities of any single generation of tools.

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ERASMUS Mobility and Socioeconomic Inequality: Comparative Narratives from Turkish Students

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Abstract

This study conducts a qualitative narrative inquiry to explore how global economic inequalities shape the financial and social dimensions of international student mobility. To prioritize idiographic depth, a purposeful design focusing on two participants was utilized to explore their lived experiences and meaning-making processes. The study tracks the pre-sojourn perceptions, in-situ experiences, and post-sojourn reflections of two middle-class English Language Teaching majors from a Turkish public university during their Erasmus+ mobility. One participant studied in Madrid, Spain, while the other was situated in Bydgoszcz, Poland, presenting divergent living cost scenarios. Employing World Systems Theory as an analytical framework, the research reveals shared initial preferences for core destinations but highlights how their trajectories diverged due to economic disparities. The participants' experiences indicate that flat-rate, country-based funding formulas may fail to buffer students against localized living cost variations, creating distinct forms of material hardship and social stratification within core spaces. This study underscores the value of tracking individual narrative identities to expose the hidden socioeconomic boundaries that challenge equity ideals in macro-level international educational planning.

Keywords: Erasmus mobility, international student mobility, socioeconomic inequality, World Systems Theory

Introduction

The Erasmus program, an initiative of the EU, has played a pivotal role in fostering international cooperation and student mobility in the realms of education, training, and youth engagement. Erasmus has historically facilitated transformative study abroad (SA) experiences for numerous students, expanding their horizons, deepening cross-cultural understanding, and fostering academic and personal growth (Brooks & Waters, 2011; Cushing et al., 2019; Murphy-Lejeune, 2002; Teichler, 2017). Erasmus provides valuable international study opportunities but simultaneously imposes financial demands that vary based on the host country and the socio-economic backgrounds of participating students (Mizikaci & Arslan, 2019).In response to the disparities arising from financial disadvantages, recent years have witnessed the initiation of projects aimed at fostering a more equitable Erasmus experience. These efforts target students' financial situations and the modification of allowances. The Social Inclusion & Engagement in Mobility project, co-funded by the EU's Erasmus+ Program (Allinson & Gabriels, 2021), revealed that 59% of mobile students received funding covering less than 50% of their expenses. The project identified the most common practical barriers to mobility as initial costs, loss of income while abroad, and additional debts incurred from a more extended degree program, all highlighting financial challenges for students (Allison

& Gabriels, 2021). An additional noteworthy effort is the *Erasmus for All* project (Universidade do Porto, n.d.), funded by the EU's Erasmus+ Program and set to conclude by the end of 2024. This project addresses equity concerns within Erasmus, specifically focusing on the adequacy of monthly grants provided to students. It contends that these grants are insufficient for many students, and financial constraints continue to hinder a significant number of participants. Consequently, the project seeks to develop a more equitable grant calculation formula, preferably based on the destination city rather than the country.

The EU acknowledges the importance of socialization processes among Erasmus program participants and offers support for research studies and projects investigating these dynamics. The main goals of these initiatives are to discern the factors influencing students' socialization and to tackle associated challenges, facilitating effective problem-solving. A current initiative contributing to this objective is the European Network on International Student Mobility: Connecting Research and Practice (ENIS) COST Action. This action seeks to generate knowledge and practical recommendations on international student mobility, including factors influencing socialization patterns.

Adequate personal financing appears to play a critical role in facilitating peer interaction and intercultural integration (collectively operationalized here as socialization) during study abroad. However, an examination of participating Erasmus+ countries highlights a lack of balanced economic distribution regarding domestic purchasing power (Hammer et al., 2022). Currently, macro educational planning allocates grants using a simplified unit-cost tier system based on broad country-level groupings. Students traveling to Group 1 destinations receive approximately 600 Euros, compared to approximately 450 Euros for those in Group 2 or 3 countries (European Commission, Directorate-General for Education, Youth, Sport and Culture, 2021). While designed to scale responsively with national cost-of-living indices, this standardized approach flattens intra-national economic variations. By focusing on uniform country-wide averages, this funding model fails to adjust for localized city-specific hyperinflation, particularly within urban housing markets (Demir Avcı et al., 2022). Unaddressed financial inequalities possess the potential to induce financial stress, significantly influencing Erasmus participants' preferences and subsequently impacting their socialization experiences. Research indicates that financial stress may lead individuals to tend toward social isolation, avoidance of social interactions (Pearlin et al., 2005), diminished self-esteem due to perceived inadequacy (Starrin et al., 2009), and an elevated risk of experiencing loneliness (Hawkley et al., 2020). Given the evidence derived from these studies pertaining to the interplay between financial status and socialization, it is plausible to posit that, within the context of the Erasmus program, variations in financial resources among its participants may precipitate social disadvantages for specific cohorts of students.

Research Questions

Utilizing the WST framework (Wallerstein, 1974), this study explores how global economic hierarchies shape the pre-sojourn country choices and meaning-making processes of international students. Rather than treating core and semi-peripheral categories as rigid determinants, the research examines how macroeconomic imbalances shape individual financial experiences and condition daily social interactions during study abroad. Furthermore, by tracking how experiences throughout the mobility journey influence student perspectives, the study investigates how localized material challenges and lived opportunities contribute to ongoing identity construction and retrospective meaning-making. The study examines these dynamics through a comparative narrative analysis of two Turkish participants, one who studied in Madrid, Spain (a core country), and the other situated in

Bydgoszcz, Poland (a semi-peripheral country). By analyzing their contextualized stories, the study aims to generate exploratory insights that can inform educational planning, resource allocation, and support structures designed to mitigate financial strain and foster more equitable mobility experiences. To achieve these aims, the study addresses the following research questions:

RQ1: In what ways do the structural positions of destination countries, as framed by World Systems Theory, influence the pre-sojourn meaning-making and country selections of mobile students?
RQ2: How do macroeconomic imbalances shape the participants' lived financial experiences and peer interactions across their respective study abroad trajectories?
RQ3: How do international students reconstruct their perceptions of international mobility, social relationships, and personal financial management within their post-sojourn retrospective reflections?

Theoretical Framework

World Systems Theory

WST, formulated by the eminent sociologist Immanuel Wallerstein (1974), represents a paradigm aimed at elucidating global patterns of social stratification (SS) and economic development. It provides an analytical framework for comprehending the intricate dynamics of the capitalist world economy as a holistic social system. Positioned within the realm of macro-sociology, WST adopts a multidisciplinary perspective, emphasizing the world system as the primary unit of analysis rather than focusing solely on nation-states (Babones, 2015; Chase-Dunn & Grimes, 1995; Wallerstein, 2004). At the core of this framework is the transnational division of labor, which categorizes economic spaces into core, semi-periphery, and periphery zones (Coccia, 2019). Rather than static or absolute silos, these categories represent relational and fluid positions within a global hierarchy. Core zones generally focus on capital-intensive production and maintain a dominant position in the global order, while peripheral spaces are restricted to labor-intensive production and resource extraction. The semi-periphery functions as an intermediate space, navigating economic pressures from core systems while simultaneously interacting with peripheral markets (Skocpol, 1977). Central to WST is this asymmetrical power hierarchy, which determines the distribution of resources, wealth, and institutional influence (Wallerstein, 2004). This division of labor is not a rigid or permanent matrix. It displays dynamism where technological advancements, domestic policy changes, and geopolitical developments allow for the upward or downward movement of states over time. Instead of viewing these zones as deterministic classifications that oversimplify global inequalities, contemporary applications of WST emphasize the flexible boundaries and internal variations within each economic zone (Chirot, 1986). This relational perspective allows the framework to serve as a flexible analytical tool for interpreting how macroeconomic imbalances filter down into individual life-course trajectories, without reducing complex, localized realities to fixed geographic labels.

Rather than viewing the capitalist world economy purely as an abstract system of global power relations, this study conceptualizes core, semi-peripheral, and peripheral positions as the immediate material boundaries within which individual student agency operates. The critical link between macro-level structures and micro-level individual narratives occurs through the uneven distribution of material resources and institutional prestige, which shapes a student's choice patterns. Macroeconomic imbalances do not dictate individual behavior directly; instead, they establish the conditions, such as domestic currency values, localized inflation, and unequal grant distribution, that individual students must actively interpret and navigate. By operationalizing WST as an analytical lens, this study examines how these macro-geopolitical imbalances filter down into the

daily financial negotiations, emotional states, and retrospective identity construction of individual participants, capturing the points where global SS becomes an embodied, lived experience.

Financial Disparities and Social Stratification

SS represents the systematically unequal distribution of power, prestige, and material resources, creating hierarchical arrangements that confer distinct privileges or disadvantages across social groups (Solar & Irwin, 2010; Wilczynski, 1981). Within this hierarchy, material resource imbalances frequently generate structural financial strain, which both stems from and reinforces existing class boundaries (Ryu & Fan, 2023). These structural constraints can restrict upward social mobility while increasing the risk of downward trajectories, sustaining intergenerational disparities across both educational and social domains (Bartels, 2008; Gkiouleka et al., 2018). These socioeconomic inequalities condition individual educational pathways (Liu & Xie, 2015). Material resource constraints can restrict a family's capacity to finance high-impact educational opportunities, such as international study abroad, which often serves as a key mechanism for accumulating social and cultural capital (Bourdieu, 1986; Bourdieu & Passeron, 1990; Reay, 2017; Reeves, 2015). Consequently, international student mobility remains heavily segmented by economic factors, including visa regulations, travel expenses, and distinct cost-of-living landscapes in destination countries (Marginson, 2016; Xiang & Shen, 2009). Students from lower or middle-class backgrounds often face financial hurdles that limit equitable access to cross-cultural education, which can reinforce existing domestic social hierarchies (Kommers & Bista, 2020).

Within the Erasmus+ framework, institutional policy measures aim to counter these structural disparities by allocating varied funding tiers based on destination country categories. The European Commission (2021) explicitly emphasizes equity and inclusion as core programmatic objectives, aiming to broaden access for individuals from diverse economic backgrounds and those facing systemic barriers. While the literature on Erasmus+ mobility has extensively tracked academic outcomes, linguistic gains, and general cultural adjustment, it has less frequently focused on this specific socioeconomic gap, often due to an analytical emphasis on macro-level student tracking data. By prioritizing overall enrollment volumes and quantitative participation rates, previous research has sometimes obscured the internal stratification occurring within the international student body. While institutional policy measures provide varying grant tiers to streamline administrative resource allocation, they treat destination nations as economically uniform blocks. A significant gap remains in critically understanding how these rigid, country-wide funding formulas are subjectively felt and navigated across the temporal life-course trajectories of individual students. Investigating how these structural funding mechanisms interact with individual student socialization and peer relationships is essential for uncovering the hidden economic barriers that continue to challenge the inclusion ideals of international mobility programs.

Methodology

This study utilized a qualitative narrative inquiry design (Chase, 2011; Clandinin & Connelly, 2000; Pinnegar & Daynes, 2007) to investigate the pre-sojourn, while-sojourn, and post-sojourn experiences of two Erasmus+ students. Narrative inquiry was selected because it moves beyond static thematic categorization to focus on the temporal continuity of lived experiences, identity construction, and the fluid meaning-making processes of individuals over time (Barkhuizen, 2013; Riessman, 2008). Rather than treating student perceptions as fixed variables, this design provides the methodological framework necessary to capture how participants subjectively navigate, interpret, and reconstruct the socio-economic boundaries of their international mobility across different phases of their life-course trajectories.

Participants and Context

The participants were two English Language Teaching majors studying at a large public university in Western Türkiye. Both students were proficient in Turkish and possessed a strong command of the English language, having either passed an institutional B2-level proficiency exam or completed 600 hours of B2-level language instruction prior to enrollment. Neither participant possessed proficiency in the native languages of their respective host countries. To explore the intersection of macro-level economic structures and micro-level student experiences, purposeful sampling was employed to select two participants who traveled to distinct economic zones under the WST framework. One participant stayed at the University of Madrid, Spain (a core country), and the other stayed at the University of Bydgoszcz, Poland (a semi-peripheral country). Both individuals were from middle-class backgrounds and undertook their mobility during the 2021–2022 academic year, a period characterized by a notable depreciation of the Turkish lira against the Euro. Prior to data collection, both participants received detailed information regarding the purpose of the study, the interview procedures, the intended use of the data, the voluntary nature of participation, and their right to withdraw from the study at any time without any consequences. Written informed consent was obtained from both participants before the interviews commenced. Given the rich contextual nature of narrative inquiry, particular attention was paid to protecting participant confidentiality. The participants were assigned the pseudonyms *Deniz* and *Melisa*, and identifying personal or institutional details that were not essential to the interpretation of the narratives were omitted or slightly modified to minimize the possibility of indirect identification while preserving the integrity of the narratives. Interview recordings and verbatim transcripts were stored in encrypted, password-protected digital files accessible only to the research team and were handled in accordance with institutional data protection procedures

In line with the idiographic epistemology of narrative inquiry, the sample size was deliberately bounded to two participants, since the analytical objective of the study was not statistical generalizability or representative mapping across a population. Instead, the study prioritized vertical depth over horizontal breadth, aiming to uncover nuanced, contextualized, and structurally situated insights into how individual student agency and identity are negotiated within macro-economic constraints.

Data Collection and Analysis

The study utilized semi-structured interviews, conducted face-to-face in private office settings to optimize participant comfort, to investigate pre-sojourn country preferences, while-sojourn social experiences, and post-sojourn perceptions. Fourteen interview questions were developed following Castillo-Montoya's (2016) framework, comprising one introductory, one transition, 11 key, and one closing question. The interviews, conducted in Turkish and averaging 82'14" in duration, were transcribed verbatim for narrative analysis (Benson et al., 2013). Following Polkinghorne's (1995) two-stage framework, the data were processed using both narrative analysis and the analysis of narratives. The narrative analysis stage involved close, iterative readings of the transcripts to identify key themes, structural narrative turning points, and chronological developments, which were synthesized into holistic, participant-centered biographical accounts. Subsequently, the analysis of narratives approach was adopted to compare these accounts, capturing how individual meaning-making processes changed across time. The WST framework was operationalized during this second stage by establishing structural codes that mapped the participants' micro-level narrative descriptions directly onto their corresponding macro-level core and semi-peripheral positions. This analytical approach focused on how macro-economic strains and social stratification variables co-

occurred with individual experiential dynamics such as situational stress, peer interactions, and social isolation. As educators operating within the Turkish higher education context, the researchers possess an insider understanding of the socio-economic pressures confronting Turkish mobility students. To prevent this contextual familiarity from causing subjective projection during data interpretation, a systematic reflexive stance was maintained. This involved continuously balancing insider insight with analytical distance, grounding all interpretive insights strictly within the verbatim transcripts, and utilizing the dual analytical lenses of WST and SS to ensure that the participants' distinct meaning-making processes remained the primary drivers of the text.

Qualitative trustworthiness and analytical rigor were established through an active audit trail documenting all coding iterations (Creswell & Poth, 2018; Lincoln & Guba, 1985; Nowell et al., 2017; Tracy, 2010). To enhance the trustworthiness of the study, strategies addressing credibility, dependability, confirmability, and transferability were incorporated throughout the research process (Lincoln & Guba, 1985; Tracy, 2010). Credibility was strengthened through member checking, whereby participants reviewed both their verbatim interview transcripts and their finalized narrative accounts to verify factual accuracy and ensure that the narratives faithfully reflected their intended meanings. Dependability was supported through a transparent and systematic analytical process, in which the progression from transcript preparation to coding, narrative reconstruction, and cross-case comparison was consistently documented through an audit trail, allowing the development of interpretations to remain traceable. Confirmability was enhanced by maintaining an explicit reflexive stance throughout the analysis, whereby interpretations were continuously revisited and checked against the original interview transcripts to ensure that the findings remained grounded in the participants' accounts rather than the researchers' assumptions. Transferability was facilitated through rich descriptions of the participants, institutional setting, mobility destinations, and broader socioeconomic context, enabling readers to evaluate the applicability of the findings to similar contexts. In addition, methodological triangulation was achieved by comparing participants' narrative accounts with institutional Erasmus+ grant allocation tables and country-level cost-of-living indices, thereby situating individual experiences within their broader structural context.

Findings

Narrative Account of Deniz's Mobility

Deniz's early accounts reveal how initial geographical and institutional contexts intersect with his personal aspirations. He initially considered Germany, Italy, and Spain for his Erasmus+ experience. Constructing his early motivations, he stated, "I had Germany, Italy and Spain in mind initially because Germany and Italy had better locations, closer to other countries.", demonstrating how he viewed access to neighboring regions as an influential factor in his initial decision-making processes. His narrative path turned toward Spain, a decision driven by his interpretation of institutional prestige and physical infrastructure. Reflecting an identity alignment with the perceived academic advantages of core-system universities (Riessman, 2008), he remarked, "The university in Spain, on the other hand, had quite a high rank and a good campus. So, I thought I could get a quality education there." Deniz's early narrative identity exhibits a sense of personal agency that appeared less immediately bounded by financial calculations. He explained:

> *"To be honest, I applied directly to Erasmus+ without looking into the financial aspects. So, my financial situation did not affect my country's preference for Erasmus+."*

This sequence underscores a meaning-making process where educational and spatial desires take precedence over immediate economic forecasting. However, this lack of immediate financial concern did not imply an absence of structural awareness. When reflecting retrospectively on the broader economic landscape he was preparing to enter, he commented, "Yes, I definitely thought about it because in Türkiye, as you know, the exchange rates are known, and the Turkish Lira is constantly losing value.", highlighting his pre-departure awareness of economic disparities between Spain and Türkiye. This awareness translated into targeted pre-sojourn practices, where Deniz sought to regulate his personal resources for volatility by utilizing his personal savings in Euros. He noted, "Well, I already had some savings from previous years. At that time, the Turkish Lira had not lost so much value, and the Euro exchange rate was at more reasonable levels. So, I had saved my money in Euros". This retrospective reconstruction highlights an active, agentic effort to prepare for the financial realities of a core nation. Despite anticipating these potential constraints, his narrative meaning-making consistently prioritized institutional quality and campus facilities, setting a baseline expectation of growth before his physical arrival in Spain. As Deniz transitioned from his pre-sojourn expectations to his lived experience within the physical landscape of Madrid, the material realities of the host environment began to reshape his daily interactions and sociality. Regarding his participation in extracurricular activities and socialization, Deniz expressed that financial constraints co-occurred with significant restrictions, stating, "In our university, we have a group called the Erasmus+ student network. They organize many activities, but all of them require a certain fee." Within his story, this reality is described as a factor that limited his participation and socializing. Faced with these economic boundaries, Deniz exercised individual agency by restructuring his plans and rejecting certain socializing opportunities. He explained, "…if there were opportunities to visit three countries, I would say let me visit one country. As much as my financial situation allows me, I will do that", illustrating how structural constraints are actively negotiated through personal compromises. His account also indicates a perceived gap in financial freedom and social participation when comparing his situation to that of peers from core EU countries. Deniz recalled:

> *"...when we go out to socialize, most of our friends there are citizens of European Union member countries such as Germany, France, and Italy, so I couldn't move around as freely as they did. Therefore, there were situations where I had to reject many opportunities for socializing unwillingly. I had to live a more balanced lifestyle because of this. ...For example, there were activities to visit other countries during our free time there. I had to miss out on many of them. I observed that students coming from other European countries did not have this problem."*

This observation suggests how Deniz experienced macro-level economic asymmetries as influencing his opportunities for social participation. These localized financial strains frequently co-occurred with personal challenges, linking his material situation to temporary feelings of isolation and exclusion. He exemplified this by remarking, "The nightlife there requires some financial strength, so I had to participate less in those activities, let's say. Not excluded, but I had to isolate myself due to some financial difficulties," emphasizing his self-directed adjustments in response to external limitations. Commenting on the low value of the Turkish Lira, he also added:

"For the first two months or so, I compared the price of everything I bought in Turkish Lira. Since 1 Euro was equal to 20 Turkish Liras, I would immediately multiply the price by 20. I would pressure myself psychologically not to buy it when I did that. Or not to go somewhere. Of course, this has negative effects on your social life. Actually, the reason I think about this is also because of the exchange rate here."

This reflection signifies how he navigated the psychological pressures of exchange rate differences, internalizing macroeconomic disparities as personal boundaries within his social life. To sustain his trajectory, Deniz deployed active coping strategies, which included cutting back on necessities such as food to manage the high cost of living in Spain. He recalled, "I was constantly eating at McDonald's because it was cheaper in Madrid. Just to save on food expenses. Apart from that, there were times when my bank account dropped to as low as 10 Euros. I managed for 12 days like that. I went through quite tough days." His narrative highlights a resilient interaction between global economic structures and individual survival practices, where managing a minimal budget became a central component of his lived social reality. Deniz's post-sojourn narrative indicated shifting perceptions regarding his personal finances and their ongoing management. Referring to his realization of the impacts of finance, he stated, "After Erasmus+, I realized how important money is," and added, "I would prefer a country where I can work and have a work permit. This would be my first criterion." The sensitivity towards finances, which he reported to have been mostly absent in his pre-sojourn period, underwent a clear transformation through his lived experience in Spain, pushing him towards a more cautious financial stance regarding possible future study-abroad experiences. His personal experience in Spain heightened his awareness of the impact of financial factors on individual socialization processes and personal attitudes towards money. The difficulties he faced during his time abroad also reoriented his perception toward the financial support provided to mobile students. He emphasized the importance of institutional funding by saying, "If the country had provided more support... my life would have been different, and maybe my socialization processes would have been more active." Within his retrospective meaning-making, Deniz viewed his finances as a limiting factor on his social activities; although he was not overly worried about financial resources before his departure, his evaluation of the Erasmus+ grant and available financial resources shifted toward a more critical perspective after participating in the program. Although he clearly acknowledged these financial difficulties, Deniz's narrative identity remains marked by resilience, as he still advocated for every student to join the program if feasible. He remarked:

"Going on Erasmus was like a life goal for me... I still have plans for an academic career in the future. I am considering doing my master's degree abroad. ...Yes, it's difficult. I struggled, but... somehow people overcame that difficulty... ERASMUS is definitely something that every student should experience, in my opinion."

His words signal that he remained determined despite the difficulties he underwent, believing that students can derive meaningful benefits from the experience. His core values regarding the intrinsic worth of studying abroad did not abandon their positive nature after his lived experience. However, it remains clear that he constructed a much more cautious perspective about finances regardless of his recommendation. He warned, "I would definitely tell them [other students] not to go to Madrid. Because Madrid is definitely a place where you need financial support." These words indicate the transformation of his perceptions regarding the financial aspect

of studying within a core-system economic landscape. Although all his initial country preferences were core nations before his sojourn, his lived experience brought him to the point of warning future participants against choosing a destination where the cost of living is high. Deniz's embodied experience appeared to have reshaped his perceptions regarding the management of personal finances following the financial stress and SS boundaries encountered during his time abroad. While money was not a primary concern before his sojourn, it emerged as a critical priority for his potential future choices due to an experiential understanding that the standard Erasmus+ grant was not fully sufficient to maintain an uncompromised lifestyle in a core country. Although Deniz continued to value the educational and personal benefits of Erasmus+, his post-sojourn narrative also revealed a growing tension between these aspirations and his financial experiences. Rather than replacing one perspective with another, his reflections suggest an ongoing negotiation between his belief in the value of international mobility and his recognition of the financial constraints that shaped his experience in Madrid.

Narrative Account of Melisa's Mobility

Melisa's narrative trajectory opens with a meaning-making process that is immediately and explicitly mediated by economic vulnerability. Like Deniz, Melisa's early aspirations were directed toward core-system spaces based on widespread narratives of development. She commented, "It is known that those countries are economically and educationally well-developed. Since they are so, I thought they would have better professors, better universities, and more advanced educational technologies," suggesting a transformation as she became aware of the advantages of core countries, which made them initially more preferable for her. However, she chose Poland due to economic factors, saying "due to economic reasons" and implying the lower cost of living in Poland. Within her narrative account, her preferences appeared contextually bounded by the anticipation of potential financial problems, orienting her experience towards a semi-peripheral country where living costs are lower. She wanted to maximize her quality of life in a semi-peripheral country. Aware of the economic disparities between core and semi-peripheral countries, she further explained:

> *"...actually, I wanted to go to Spain, but since the Euro was high, I preferred to go there because the currency of Poland was lower."*

This economic calculation shaped the temporal dimension of Melisa's pre-departure experience, fostering an account characterized by a unique sense of security regarding her chosen destination. She implicitly compared core and semi-peripheral countries by saying:

> *"It [Saving money beforehand] happened. I did, but I didn't save too much, to be honest. Because I knew that the grant would be enough. If I went to another country, a country with a Euro currency, I would definitely have to save a large amount. In countries where the currency was the euro, most of the grant went to accommodation. Accommodation there was taking too much from the budget, but there was no need for such a thing in Poland. In fact, whoever wanted to go to Poland could go to Poland without any savings."*

Here, she acknowledged the lower cost of living in semi-peripheral countries and the sufficiency of the Erasmus+ grant. In Melisa's decision, her lived understanding of the economic disparities among core and semi-peripheral countries was clearly visible. As Melisa transitioned into

her lived experience within Poland, the financial ramifications of moving to a country with a larger economy than one's own emerged with subtle nuance. When asked about such ramifications, Melisa noted, "There were also affordable activities; it was enough for them [students], but yes, of course, there were activities that required a higher budget; it affected me in that regard. Yes, it did. I was able to attend some of them; some of them I couldn't attend due to financial reasons. This reflection indicated financial disadvantages related to the economic disparities between the home and the host countries, revealing how structural factors presented partial boundaries to full participation. Regarding her social experience with other students, Melisa commented that her financial situation never affected her choice of friends, stating, "No, no, materialism never affected us. No people were coming from very rich countries", suggesting that she spent most of her time with students coming from similar backgrounds of financial limitations, and within this specific peer circle, social interactions and relationships were not heavily strained by finances. However, her narrative identity also involved navigating a lack of contact with local Polish students, whom she perceived as able to participate in extracurricular activities. On that, she said, "I don't find Polish students friendly, so I didn't have the chance to spend much time with them, but as far as I saw, they didn't have such a problem. They could do everything very comfortably", indicating how she interpreted her socialization processes. While her immediate peer relationships felt uninfluenced by financial stratification, her lack of contact with local students was constructed as a matter of mutual attitudes rather than a consequence of economic stress. When asked if she ever felt isolated or excluded due to her finances during her SA, she firmly said, "No, I have never had such an experience." However, Melisa also reported that some of her friends had to self-exclude from social activities due to their money management issues. She commented, "I think they couldn't control their budget; they spent too much when they first came, and later on they had less money in their pockets, so they were more cautious. So, they couldn't participate in every activity." From Melisa's perspective, her peers' financial challenges were interpreted not as a result of the disparities between host and home economies, but as a result of individual management problems. Because she perceived herself as managing her finances sufficiently, she did not experience a sense of personal social exclusion or isolation within her main environment. Nevertheless, Melisa's narrative reveals that her financial peace of mind was contextually dependent on the monthly Erasmus+ grant she received. Regarding her management of financial stress, she explained:

> *"It was already clear how much it would cost for accommodation and how much grant I would get in total. It was clear how much the living expenses were there, how much was spent on food and drinks; the monthly average was clear. Taking these into account, I adjusted my budget accordingly and organized my expenses carefully in this way. So maybe I did not experience financial stress in this way."*

This careful budget planning allowed her to maintain stability within Poland, but her account revealed that this economic balance was fragile. She mentioned requiring family support when she stepped outside the semi-peripheral market and took a leisure trip to Italy towards the end of her studies. She noted, "but later on I needed it in countries like Italy where the currency is Euro," showing that entering a core economic zone exposed her to the material limitations of her budget and necessitated external support. Melisa's lived experience indicated that moving from a semi-peripheral country to another semi-peripheral country with the Erasmus grant as the main source of income could facilitate a stable experience, minimizing the severe financial stress or negative impacts on socialization often associated with SS. Her initial preference for a semi-peripheral country co-

occurred with manageable economic conditions during most of her stay. Even so, her narrative is not entirely free of constraints; her experiences during the Italy trip and her missing of certain high-budget activities reveal how global economic structures still framed the outer boundaries of her international mobility. The negotiation of these boundaries during her stay shaped the temporal evolution of her post-sojourn reflections and identity construction. Melisa's perception of personal finances underwent certain changes as a result of her lived experience in Poland. After her sojourn, she felt an improvement in her financial management skills, commenting:

> *"So yes, definitely. I think it has improved, already in my first experience abroad. So how do I convert the money, where is it, how do I convert it so that there are less deductions? There will be a currency exchange rate difference or something like that. Where can I cut back, where can I allocate more budget? I gained more experience in this regard. It contributed to planning my expenses."*

This points to a process where her awareness of handling money in a foreign country increased, leading her to internalize the importance of financial management and planning within her developing narrative identity. Because Melisa made a personal finance-based choice of the country to study abroad and experienced that the Erasmus+ grant was sufficient to make a living within the Polish context, her perceptions regarding the baseline adequacy of the financial support she received remained steady. Having visited Italy during her studies, however, her awareness regarding the high cost of living in core countries and the potential insufficiency of the grant within those spaces appeared to expand. She noted:

> *"I don't think I could ever live in the same comfort because of the exchange rate... the grant was less than those countries. Because when I travelled around, I saw how cheap the country actually was, even cheaper than Poland... Those countries were not expensive, but the grant was less than in those countries. That would be the reason."*

Through this comparison, her understanding of the affordability of core countries under the standard grant model underwent a transformation, which confirmed her pre-sojourn financial concerns. When asked if she would recommend participating in the Erasmus program to other students, Melisa expressed cautious views, focusing explicitly on the pre-sojourn expenses that are not covered by the program. She stated, "I think students who are not financially able to go to Erasmus cannot go. So, this grant is given after you go. Before that, there were many expenses. Visa, health insurance, flight tickets, etc. I think people from every financial situation and class cannot go." Despite these barriers, she still recommended the experience to those who possess the necessary resources, adding:

> *"...if they trust themselves, they should go. Of course I recommend them. But I mean, these are the realities, there will be such expenses. Such money will come out of their pockets. So if these are not provided, they cannot go anyway. It's that clear."*

Her reflections showed that while she viewed the mobility experience as valuable, her narrative identity integrated a strong focus on the realities of class and financial background as

critical gatekeepers to international education. Although her trajectory was characterized by lower levels of stress, her post-sojourn narrative highlighted significant changes in her meaning-making and awareness. She developed an understanding of budget management and the practical aspects of handling currency differences, while simultaneously concluding that maintaining the same quality of life in a core country would be unfeasible under the standard Erasmus+ grant model. Rather than reaching a fixed conclusion, Melisa's post-sojourn reflections illustrate how her understanding of international mobility became increasingly layered. While she continued to regard Erasmus as a valuable opportunity, this appreciation coexisted with heightened awareness of financial inequalities and the practical limitations imposed by different economic contexts.

Analysis of the Narratives

Both narrative accounts seem to reveal how global academic hierarchies shape pre-sojourn horizons. Within the narrative dimensions of place and sociality (Clandinin & Connelly, 2000), both participants initially desired core-country mobility due to perceived educational superiority, reflecting WST dynamics. However, their operational paths diverged through individual agency. Deniz prioritized institutional prestige and bracketed financial risks in Spain by anxiously accumulating Euros, whereas Melisa calculated these macro-asymmetries and strategically redirected her trajectory toward a semi-peripheral destination (Poland), assuming the standard grant would be sufficient given the lower local cost of living. During the sojourn, these choices generated contrasting lived realities. Deniz experienced material hardships in Madrid, leading him to compromise essential needs like food and self-exclude from paid student networks, which translated macro-level stratification into temporary relational barriers and social isolation. Contrarily, Melisa experienced financial comfort in Poland, focusing on tactical budget management rather than systemic deficits. This insulation, however, was non-linear; a brief leisure trip to Italy exposed her budget's boundaries, requiring external family support and validating her initial anxieties regarding core-country affordability. Rather than representing absolute, deterministic laws, these divergent trajectories function as exploratory narrative accounts showing how individual agency intersects with host-country economic placement to produce context-dependent integration outcomes.

Post-sojourn retrospective reflections reveal profound, non-linear shifts in narrative identities (Riessman, 2008). Deniz's direct encounter with material precarity transformed his core priorities, instilling a permanent framework of financial caution that was absent from his optimistic pre-departure perspective. Melisa's reflections developed along pragmatic lines, focusing on the tactical mastery of daily financial requirements. While both participants maintained a positive outlook toward the intrinsic value of international mobility, their transformed narrative identities were marked by financial caution. Both concluded that subsisting on a standard Erasmus+ grant within a core economic system presented a highly constraining environment for underprivileged students, reframing core-country mobility not as a seamless space of opportunity, but as a context fractured by macro-economic barriers.

Discussion

The narrative accounts investigated suggest how financial disparities among nations can actively shape the participants' Erasmus+ program preferences. From an analytical WST perspective, a participant's favor toward participating in economically developed core countries operationalizes how macro-level structural inequalities filter into micro-level biographical decisions. Paradoxically, the other participant's account reveals a decision to pursue Erasmus+ in a semi-peripheral country due to anticipated financial constraints, highlighting how individual life-course goals are actively

negotiated within and contextually bounded by the global economic hierarchies articulated by WST. This motivation to prefer core countries resonates with general and labor migration trends (Jusufi & Ukaj, 2020; Żuk et al., 2019), indicating that inter-country economic disparities function as structural impetuses influencing even highly-skilled professionals, a notion also postulated by the analytical dimensions of WST (Wallerstein, 1974). While these illustrative findings cannot be generalized, such micro-level narrative dynamics demonstrate how structural positions shape the subjective horizons of individuals, contributing to the existing developmental disparity among nations where the migratory patterns of individuals from underprivileged regions are viewed as playing a role in shaping human capital distribution, furthering social and economic disparities internationally.

Deniz, participating in Erasmus+ in a core country from a semi-peripheral country, experienced emotional distress and identity constraints due to financial hardships that co-occurred with social isolation, compromised daily needs, and fewer resources compared to peers from core countries. This aligns with studies showing how financial constraints impact individual socialization (e.g., Hawkley et al., 2020; Pearlin et al., 2005; Starrin et al., 2009), illustrating how macro-economic strains can be translated into micro-level relational barriers within a student's narrative. These narratives suggest that such disparities may contribute to unequal opportunities for some students under particular circumstances. While these exploratory findings cannot be generalized to all mobile students, Deniz's narrative indicates how rigid, country-based funding formulas struggle to account for localized costs of living, which combine to exacerbate the financial struggles of students. Such disparities seem to foster potentially unequal opportunities between core and semi-peripheral country students in international mobility, conceptually hindering the fulfilment of the program's overarching objectives. These exploratory findings provide preliminary support for considering city-based funding models. Further research could explore the prevalence of these grant adequacy issues across larger student samples. Deniz's views on the disparities within the Erasmus program reflect broader social inequalities regarding income, education, and social status as outlined in the SS framework (Solar & Irwin, 2010). Despite equal educational access, his limited Erasmus grant and personal savings reportedly influenced his social status and socialization opportunities. In Deniz's lived experience, SS manifested itself as an unequal distribution of opportunities, showing how macro-structures can be subjectively felt as reinforcing existing social hierarchies.

Rather than reflecting a uniform developmental progression, the post-sojourn narratives illustrate how participants continually reconstructed their interpretations in response to changing experiences. Their accounts contained moments of continuity, reconsideration, and tension, suggesting that meaning-making remained dynamic rather than culminating in a single, coherent perspective (Merleau-Ponty, 1945). Contrary to the previous notions of fixed and stable perceptions, recent studies acknowledge perceptions as intricate and multifaceted (Güvendir, 2017; Surtees, 2016) due to the growing acknowledgement of learner perception as a contextual and dynamic construct (Zaykovskaya et al., 2017). From a narrative inquiry perspective, these changes should not be interpreted as linear or complete transformations. Rather than replacing earlier beliefs with entirely new ones, both participants' accounts revealed ongoing negotiations between prior expectations and lived experiences. Their narratives contained continuities alongside revisions, illustrating how meanings were repeatedly reconstructed in response to changing social and economic contexts. This fragmented and context-dependent process of meaning-making reflects the dynamic nature of narrative identity, in which contradictory perspectives may coexist rather than resolve into a single, stable interpretation. Deniz's Erasmus experience appeared to increase his awareness of the financial influences of socialization and monetary attitudes, emphasizing the subjective importance of financial preparedness and support for an enhancement of the individual

experience and well-being. These insights tentatively contribute to an exploratory understanding of the complex outcomes of international mobility and the need to address financial considerations for maximizing the potential benefit from such programs. Further research could explore more diverse student backgrounds to reveal financial perceptions and their effects on socialization.

Conclusion

Within the scope of this exploratory study, country of origin seems to have a role in the participants' perceived financial advantages and resource access during the Erasmus+ experience. Reportedly, peers from economically developed core countries are described as participating in more activities and experiencing better living conditions and intercultural encounters, illustrating potential advantages in educational mobility. Contrarily, the participant from a less developed semi-peripheral country experienced financial constraints and stress, with limited access to resources and program involvement in a core country. This inequality does not dictate uniform paths, but it can create a highly restrictive environment where social origins shape experiences and outcomes, conceptually reflecting elements of global stratification in international mobility. The unequal opportunities observed within these narratives demonstrate how the program can reflect wider patterns of privilege and disadvantage. The participants' narratives suggest that socioeconomic differences may continue to shape aspects of students' experiences during international mobility. These narratives raise the possibility that existing social hierarchies may be reflected or reproduced within some international mobility experiences. Theoretically and methodologically, these findings synthesize how the static macro-level structures of WST are actively resisted, negotiated, and internalized within the fluid temporal and social dimensions of individual lived experiences.

Grounded in these specific narrative insights, tackling the socio-economic disparities in the Erasmus program requires coordinated action. Policymakers, institutions and stakeholders should acknowledge the impact of socio-economic background on individual SA experiences and implement differentiated financial aid schemes, targeted support, and inclusive initiatives to alleviate the localized material barriers identified in this study. By recognizing and tackling this problem, the program can work toward becoming more inclusive, providing more equitable opportunities for students from diverse backgrounds. Because this study relies on a purposeful sample of two participants during a specific period of domestic currency depreciation, the findings are exploratory rather than generalizable. In line with narrative inquiry, the analytical goal was idiographic depth over horizontal breadth. Therefore, the transferability of these insights to broader student populations or different macroeconomic contexts should be approached cautiously.

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Appendix A - Participant Profiles

	Deniz	Melisa
Age	26	23
Gender	Male	Female
Field of Studies	English Language Teaching	English Language Teaching
Native Language	Turkish	Turkish
Foreign Language(s)	English	English
SA Destination	Madrid, Spain	Bydgoszcz, Poland
SA Period	2021-2022	2021-2022
SA Duration	1 Year	1 Year
Grant Received	600 Euros/Month	450 Euros/Month
Accommodation	Room rental	Dormitory

Implementation of Educational Quality Plans in Ethiopian Colleges of Teacher Education

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Abstract

Effective implementation of educational quality plans is essential for improving educational quality, accountability, and continuous institutional improvement. This study examines the implementation of these plans in Ethiopian colleges of teacher education. The study employed a convergent parallel mixed-methods design. Quantitative and qualitative data were collected concurrently from five colleges of teacher education selected from five regions of Ethiopia. Quantitative data were obtained from 302 teacher educators using a closed-ended questionnaire. The qualitative data were collected through semi-structured interviews with deans, vice deans, heads of internal quality inspection units, and regional education bureau experts, supplemented by document analysis. Descriptive statistics were used to analyze the quantitative data, while the qualitative data were subjected to thematic analysis. Findings from these two datasets were integrated during interpretation. The overall finding was that educational quality plans were implemented partially and inconsistently across the sample colleges. The study concludes that, although Colleges of Teacher Education have established quality planning structures, implementation remains uneven and is constrained by institutional and systemic challenges. Strengthening leadership support, stakeholder participation, monitoring systems, and continuous improvement mechanisms could enhance the implementation of educational quality plans and, ultimately, improve the quality of teacher education in Ethiopia.

Keywords: educational quality plans, implementation, continuous quality improvement, colleges of teacher education

Introduction

Globally, educational institutions heavily depend on quality management plans to lead their operations through clearly defined objectives, performance indicators, monitoring mechanisms, and evaluation processes for continuous improvement (Harvey & Green, 1993; Sallis, 2014). Educational quality has become a major global concern due to rising demands for accountability, expanding educational access, increasing expectations of employability, and institutional competitiveness. Consequently, institutions are expected to systematically plan and implement activities that promote desired standards of performance and institutional effectiveness (Jawad et al., 2015). Quality planning,

therefore, serves as a structured mechanism through which institutions organize policies, systems, and processes to improve and sustain the quality of educational services and outputs (Hayward, 2006). Higher education institutions (HEIs) worldwide have adopted quality management systems, quality assurance frameworks, and continuous improvement procedures in response to increased emphasis on quality. In higher education, the importance of quality management has steadily grown in enhancing institutional effectiveness, performance, and responsibility (Ganguly, 2015; Mumuni & Aboagye, 2017). Additionally, studies show that HEIs in developed and developing nations, including several African and Arab countries, are becoming more interested in quality management methods (Garwe, 2015; Govender et al., 2014; Randheer, 2015). Within this broader quality drive, Educational Quality Plans (EQPs) have emerged as important institutional mechanisms for translating quality policies into practice. EQPs guide quality objectives, implementation activities, monitoring and evaluation procedures, stakeholder participation, and continuous improvement efforts (Krooi et al., 2024). According to Guil Gorostidi and Rubio-Arostegui (2025), EQPs advocate quality improvement procedures, institutional accountability, and evidence-based decision-making in higher education.

Teacher education institutions occupy a particularly strategic position within education systems because they prepare future teachers who directly influence the quality of education and student learning outcomes. According to Darling-Hammond et al. (2017) and Douglas-Gardner & Callender (2023), teacher education is therefore accorded policy priority to prepare qualified, professionally skilled, and ethically committed teachers. High-performing education systems particularly emphasize strong teacher preparation, continuous professional development, and institutional quality mechanisms (Darling-Hammond et al., 2010; Darling-Hammond, 2017). In developing countries, despite the increasing interest in using quality plans, various factors appear to hinder their successful implementation. These challenges are particularly significant for Colleges of Teacher Education (CTEs), which are responsible for preparing competent teachers and strengthening national education systems. In Ethiopia, several educational reforms and quality initiatives were introduced to improve educational quality and equitable access. Among these reforms were the implementation of the General Education Quality Improvement Package (GEQIP), teacher competency assessment and licensing systems, national professional standards for teachers, and accreditation standards for colleges of teacher education (Ministry of Education [MoE], 2012; 2017). In particular, the Teacher Education System Overhaul (TESO) introduced major structural reforms and curriculum guidelines to prepare academically competent, professionally skilled, and ethically committed teachers (MoE, 2003). In line with these reforms, Ethiopian CTEs were expected to implement quality management frameworks consistent with national education policies and institutional goals (MoE, 2015).

Educational institutions increasingly adopt educational quality plans to improve institutional effectiveness and educational outcomes. Despite these efforts, concerns remain regarding the implementation of educational quality initiatives. The existence of quality plans does not necessarily guarantee effective implementation, as the translation of policy intentions into practice is often impeded by institutional and systemic constraints. Research in Ethiopian higher education also shows that implementation often fails due to weak monitoring systems, inconsistent implementation and follow-up of planned activities, inadequate leadership commitment, limited stakeholder participation, resource constraints, and limited use of evaluation feedback for institutional improvement. Despite the efforts made to improve educational quality, reports from CTE meetings, educational management information systems, and graduate licensing examination results indicated gaps between quality intentions and actual practices (MoE, 2015). A few studies in

Ethiopian higher education have also examined educational quality, leadership, curriculum change, and quality assurance (Akllilu, 2022; Ibido, 2020; Mirado, 2022; Wariyo, 2020). However, limited empirical attention has been given to how educational quality plans were implemented in CTEs. Specifically, little is known about the extent of implementation, the consistency of monitoring and evaluation practices, and the contextual factors influencing implementation. This might be associated with a lack of leadership commitment, frequent changes to quality policy, and inadequate resources and facilities. A lack of comprehensive evidence on these issues may affect policymakers' and institutional leaders' ability to design context-specific strategies to strengthen the implementation of quality plans in CTEs. In sum, although Ethiopian CTEs have adopted various quality policies and plans, concerns remain regarding their effective implementation. Existing studies provide limited empirical evidence on how these plans are understood, enacted, and monitored within Ethiopian CTEs, particularly from the perspectives of multiple stakeholders. Consequently, there is insufficient evidence to determine the extent to which educational quality plans are implemented and the factors influencing their implementation. This study therefore seeks to address this gap by examining the implementation of educational quality plans and their effectiveness based on the experiences and perspectives of multiple stakeholders.

Research Questions

How are educational quality plans implemented in Ethiopian colleges of teacher education? More specifically, the study addresses the following two research questions:

RQ1. To what extent are educational quality plans implemented in Ethiopian colleges of teacher education?

RQ2. How do stakeholders describe the implementation of educational quality plans in colleges of teacher education?

Theoretical Framework

This study draws on three complementary theories to explain the rationale for adopting EQPs, how they are implemented, and the institutional and contextual factors that influence implementation. It is thus argued that no single theory sufficiently captures these interrelated dimensions. In accordance with that, the study is informed by policy implementation theory, systems theory, and institutional theory. Taken together, these theories are hoped to provide a comprehensive conceptual foundation for the study. Policy implementation theory serves as the primary theoretical lens because EQPs are institutional policies whose effectiveness largely relies on how they are translated into practice. This theory emphasizes that leadership commitment, communication, stakeholder engagement, and monitoring mechanisms are critical to successful implementation of EQPs (Pressman & Wildavsky, 1973; Honig & Hatch, 2004). Systems theory views CTEs as interconnected organizations in which quality outcomes are dependent on the coordinated functioning of leadership, academic units, staff, students, and resources (von Bertalanffy, 1972). Institutional theory explains that organizations adopt policies and practices to gain legitimacy and respond to external pressures from governments, professional bodies, and accreditation agencies (Meyer & Rowan, 1977; Scott, 2022). Ethiopian CTEs implement EQPs largely in response to quality assurance frameworks and directives issued by the MoE and REBs. These theories, in combination, offer a comprehensive framework for examining the implementation of EQPs in Ethiopian CTEs by explaining the implementation process, institutional dynamics, and policy environment.

This study conceptualizes the implementation of EQPs as a multidimensional institutional process through which quality objectives are translated into practice within CTEs. The study focuses on four interrelated dimensions: planning and communication, management commitment and support, monitoring and evaluation, and continuous quality improvement that reflect effective implementation (Deming, 1986; Krooi et al., 2024; Sallis, 2014). The conceptual framework assumes that higher levels of practice across these four dimensions indicate stronger implementation of EQPs. While quantitative data are used to assess the extent to which these dimensions are implemented, the qualitative data provide contextual explanations of how implementation occurs in practice, including the factors that facilitate or hinder the process. Together, the two datasets provide a comprehensive understanding of the implementation of the quality plan in Ethiopian CTEs.

Quality in Higher Education

Quality is a contested concept that carries different meanings depending on institutional goals, stakeholder expectations, and desired educational results. In higher education, quality is often defined as exceptional (excellence), consistency (perfection), fitness for purpose, value for money, and transformation (Harvey & Green, 1993; Harvey & Knight, 1996). The concept of quality as exceptional emphasizes high standards and institutional excellence, encouraging institutions to pursue superior performance in teaching, research, and governance (Carney, 2022). However, in contexts where resources are scarce, these standards may not be attained persistently. The notion of quality as consistency focuses on conformity to established standards and reliable institutional processes, emphasizing standardized curriculum implementation, fair assessment, monitoring, and accountability mechanisms (Boeskens et al., 2020). The concept of fitness for purpose intends to assess quality based on the extent to which institutions achieve their stated goals and intended functions (Prisacariu & Shah, 2016). This perspective is particularly relevant to teacher education because CTEs have distinct mandates to prepare competent teachers. Another important perspective, value for money, emphasizes the efficient, effective, and accountable use of institutional resources to maximize educational outcomes (Ibidunni et al., 2023). A third perspective, transformation, views quality as a process of enhancing learners' knowledge, skills, attitudes, and personal development (Harvey & Green, 1993). Taken together, these perspectives suggest that quality in higher education cannot be adequately understood through a single definition. As argued earlier, a complete understanding of quality in CTEs requires a combination of perspectives that encompasses excellence, consistency, institutional purpose, efficiency, and transformative educational outcomes. Achieving these educational dimensions of quality also depends on coherent institutional policies, effective leadership, adequate resources, and systematic improvement mechanisms. Despite these conceptual and practical insights, the literature in low-income countries, including Ethiopia, has focused on universities with relatively limited emphasis on CTEs.

Educational Quality Plans

Educational quality plans are strategic documents designed to guide the systematic improvement of educational quality within institutions. They often outline institutional goals, standards, priorities, responsibilities, implementation activities, timelines, and monitoring mechanisms to support quality improvement (Chukwumah, 2015; MoE, 2021). EQPs are often combined with strategic planning frameworks and translate institutional quality goals into actions (Krooi et al., 2024). The development of EQPs typically begins with an institutional quality policy that reflects an institution's commitment to quality and provides a framework for setting measurable objectives (Sallis, 2014). Strategic quality planning enables institutions to align resources, institutional priorities, and operational activities with

quality goals; without it, quality improvement efforts are often fragmented and inconsistent. EQP has various common components that can be conceptualized as interrelated dimensions of purpose, people, and process in aligning institutional goals, stakeholders, and implementation systems.

In higher education, EQPs function not only as administrative documents but also as mechanisms for quality enhancement, accountability, institutional effectiveness, and continuous improvement (Guil Gorostidi & Rubio-Arostegui, 2025). EQPs enhance teaching-learning processes, institutional performance, and student outcomes through planned interventions (Mensah, 2020). They also inspire stakeholder participation in quality improvement processes, assist evidence-based decision-making, and provide strategic guidance (Krooi et al., 2024). However, many HEIs, including CTEs, experienced a policy–practice gap where quality plans were not properly operationalized (Whalley, 2019). This unresolved issue provides a strong justification for the present study.

Quality Management in Education

Quality Management (QM) is a systematic approach aimed at ensuring that organizational processes and outcomes consistently meet defined standards and stakeholder expectations (Sallis & Hingley, 1991). Initially, QM was developed in industrial and business settings to promote continuous improvement, customer satisfaction, defect prevention, and organizational effectiveness (Deming, 1986; Oakland, 2014). Gradually, it has increasingly been adapted to higher education to improve institutional effectiveness, accountability, and educational outcomes (Sallis, 2014). In educational settings, QM involves coordinated processes of planning, implementation, monitoring, evaluation, and continuous improvement to enhance educational quality.

Quality assurance (QA) is a key component of QM, focusing on defect prevention through planned and systematic processes. QA is proactive and process-oriented, focusing on standards, monitoring methods, and institutional processes to assure educational quality, equity, and effectiveness (Sallis, 2014). In HEIs, including CTEs, it works through accreditation, internal audits, and external evaluations to ensure compliance with standards and continuous institutional improvement. Quality control is another component that is associated with verification and adherence to standards. In educational contexts, it includes internal verification methods designed to ensure that educational delivery meets planned benchmarks and institutional objectives (Borahan & Ziarati, 2002). Quality management focuses on constant assessment, feedback, and corrective action to improve institutional performance, laying the foundation for sustainable quality improvement (Sallis, 2014). Effective QM promotes leadership commitment and support, stakeholder participation, institutional coordination, adequate resources, and evidence-based decision-making to establish a culture of continuous improvement in educational institutions (Sallis & Hingley, 1991). The foregoing review of the literature suggests that, although substantial scholarship has investigated quality in higher education, educational quality improvement, and quality management, comparatively little attention has been given to the implementation of EQPs in Ethiopian CTEs. Particularly, little is known about the extent to which EQPs are designed, implemented, and monitored. There is also a scarcity of literature on how EQPs contribute to CTEs in enhancing educational quality. Addressing these gaps provides the rationale for this study and contributes to the literature on educational quality implementation principles and to policy practice within Ethiopian teacher education.

Methodology

This study was guided by the pragmatic paradigm, which provides a philosophical foundation for integrating quantitative and qualitative approaches to address the research problem (Creswell & Poth, 2016; Teddlie & Tashakkori, 2009). Pragmatism was adopted for the study because it is well suited to mixed-methods research, supports the use of multiple sources of evidence to achieve an in-depth understanding of the implementation of EQPs, and provides practical solutions.

Research Design

A convergent parallel mixed-methods design was employed, in which quantitative and qualitative data were collected concurrently, analyzed separately, and integrated during interpretation to achieve a comprehensive understanding of educational quality plan implementation in CTEs (Hesse-Biber & Leavy, 2011; Plano Clark, 2017). Quantitative and qualitative data are given equal emphasis in the study. The design is appropriate because quantitative data provide evidence regarding the extent of implementation, while qualitative data offer contextual explanations of stakeholders' experiences and perspectives. Integrating the two datasets enables triangulation and strengthens the interpretation of findings (Creswell, 2012). The study was conducted in five CTEs selected from different regional states of Ethiopia. These CTEs were Debre Berhan in the Amhara region, Dilla in the Southern Ethiopia region, Dr. Abdulmejid Hussein in the Somali region, Harar in the Hareri region, and Hawassa in the Sidama region. They were included in the sample due to their variation in institutional and contextual experiences in the implementation of educational quality plans.

Sample and Sampling Techniques

The study focused on CTEs currently implementing teacher education reform based on the education and training roadmap (MoE, 2020). Based on the transitional period teacher training program guideline (MoE, April 2021), CTEs were categorized into high-, medium-, and low-performing colleges. This study targeted high- and medium-performing CTEs because these colleges had launched new (degree) programs alongside existing diploma programs under the national education and training roadmap. A multistage probability sampling technique was employed to select study sites and participants (Creswell & Creswell, 2018). First, eligible CTEs were identified with their respective regions as clusters. According to the 2022/23 educational management information system (EMIS), 20 CTEs across eight regions met these criteria and constituted the target population. Then, five regions containing these target CTEs were selected from eight regions using simple random sampling. Finally, five CTEs, one CTE from each region, were included in the study using either simple random sampling or census, depending on the number of eligible colleges in the region. A college was selected from each region because CTEs within a region share similar contexts, and choosing one or many CTEs from the same region was not expected to differ significantly, except for geographical location.

For the quantitative data, teacher educators were selected because they are directly involved in implementing EQPs and possess relevant institutional experiences. A stratified sampling technique was used to determine the number of participants proportionately from each CTE, followed by simple random sampling to select individual teacher educators from the institutional sampling frames (Cohen et al., 2002). A total of 332 questionnaires were distributed, of which 302 were returned and deemed usable, yielding a response rate of 90.96%. For the qualitative data, participants were selected through purposive sampling based on their involvement in quality planning and implementation. These participants included CTE deans, vice deans, heads of the internal quality inspection units, and senior experts from REBs. The deans and vice deans were included in the

sample because they are expected to lead the institutional quality plan implementation. Similarly, REB senior experts were selected because of their roles in monitoring, supervision, and institutional support. Purposive sampling was employed to select information-rich participants capable of providing detailed insights into EQP implementation (Cohen et al., 2002). Table 1 shows the type and number of participants.

Table 1. *Type and number of participants*

No.	Type of participants	No. of participants		
		Sample size	No. of participants	Response rate
Teacher educators		332	302	90.96%
Deans/vice deans and unit heads		-	12	
REB senior experts		-	4	

The sample size for the quantitative component was determined to ensure sufficient representation and statistical adequacy. Larger samples are recommended to reduce sampling error and improve statistical power and representativeness (Creswell & Creswell, 2018; Dattalo, 2008; Hair et al., 2013).

Data Collection

A structured, closed-ended questionnaire was developed by the researchers to assess the implementation of EQPs in CTEs (Gay et al., 2009). The questionnaire items were generated based on the study objective, research questions, and an extensive review of the literature on educational quality management, quality assurance, continuous quality improvement, and Educational Quality Plans (e.g., Harvey & Green, 1993; Sallis, 2014). The development of the instrument was further informed by key Ethiopian education policy documents, including the education and training policy (Federal Democratic Republic of Ethiopia [FDRE], 2023), the sixth education sector development program (MoE, 2021), the education development roadmap (MoE, 2020), and regional legislation establishing CTEs. The draft instrument was reviewed by four senior experts from the Ministry of Education with expertise in educational planning, quality assurance, teacher education, and research methodology. The review focused on the relevance, clarity, and representativeness of the items. The experts' feedback informed revisions to the wording, sequencing, and coverage of the questionnaires. The revised questionnaire was subsequently pilot-tested with 42 teacher educators from a comparable CTE that was excluded from the main study. The pilot study assessed the clarity and reliability. Based on the expert review and findings of the pilot test, the instrument was refined before its final administration. The final questionnaire comprised two sections: respondents' background information and items measuring the implementation of EQPs. Semi-structured interviews were used to gather qualitative information. Based on the ideas of Creswell and Poth (2018), an interview guide was created to ensure consistency using probing questions. Participants' experiences, opinions, and descriptions of the implementation of the educational quality plan in CTEs were investigated through interviews. Interviews were conducted at participants' workplaces and lasted approximately 50–60 minutes. To improve trustworthiness, probing questions were used to clarify responses and obtain detailed explanations. Data were collected until information saturation. With participants' consent, interviews were recorded and supplemented with field notes.

Document and Data Analysis

Document analysis was conducted to complement the questionnaire and interview data. Institutional documents reviewed included strategic plans, educational quality plans, monitoring and evaluation reports, internal quality audit reports, and implementation reports. These documents were examined to understand institutional practices related to quality plan implementation and to triangulate evidence from other data sources. The quantitative data were coded, entered, cleaned, and analyzed using SPSS version 22. Descriptive statistics techniques, including frequencies, percentages, means, and standard deviations, were used to examine the extent of quality plan implementation in the CTEs. Thematic analysis was used to examine qualitative data obtained from document reviews and interviews (Creswell & Creswell, 2018). To become acquainted with the information, precise transcriptions of recorded interviews were read several times. Based on recurrent patterns and meanings in the execution of the educational quality plan, the transcripts and field notes were categorized and arranged into themes. The participants' experiences, institutional practices, and implementation challenges were then described using themes. The quantitative and qualitative findings were integrated during interpretation and discussion stages in accordance with the principles of mixed-methods research (Creswell & Plano Clark, 2023; Johnson & Christensen, 2019). The quantitative results were first presented, and the qualitative findings were used to explain, confirm, elaborate, or conceptualize the statistical results. Areas of convergence, complementarity, and divergence between the two datasets were identified and interpreted. The integration of these two datasets provides a more comprehensive understanding of quality plan implementation in the CTEs rather than using either quantitative or qualitative data alone.

Validity and Reliability

Ensuring validity and reliability is essential for enhancing the rigor and trustworthiness of research findings. Validity refers to the accuracy of an instrument for measuring desired variables, whereas reliability concerns the consistency and stability of measurements over time (Fraenkel & Wallen, 2009; Hair et al., 2013). Several measures were undertaken to ensure the validity and reliability of the study instruments and findings. For the quantitative findings, the content, face, and construct validities of the questionnaire were improved through expert peer reviews and pilot test data analysis. The reliability of the questionnaire was assessed using Cronbach's alpha, which measures the internal consistency of scale items. With an overall reliability coefficient of 0.88, the internal consistency was very good ($\alpha \geq .70$) (Hair et al., 2013). Item–total correlation analysis, which ranges from .40 to .62, was also conducted to assess the contribution of individual items to the overall scale. Since the range is above the accepted threshold (.30), the questionnaire items were sufficiently correlated with their respective constructs. For the qualitative findings, trustworthiness of instruments was enhanced through strategies that ensured credibility, dependability, and confirmability (Creswell & Poth, 2018). Interview data were recorded, transcribed, and supplemented with detailed field notes. To improve credibility, interview responses were cross-checked against institutional documents and evidence from multiple participants. The evidence from multiple data sources and methods, including questionnaires, interviews, and document analysis, was triangulated to strengthen the trustworthiness of the findings.

Ethical Consideration

Mindful of the advice given by Cohen et al. (2002) and Patten, 2016, before the data collection, participants were informed about the purpose, procedures, and significance of the study, and their participation was based on informed consent. Participants were informed that their involvement was

entirely voluntary and that they could withdraw from the study at any stage without any negative consequences. Anonymity and confidentiality were upheld at every stage of the study. Participants received assurances that the data they provided would be kept private and used only for academic reasons. During data processing and reporting, participant identities were substituted with codes and pseudonyms to ensure anonymity.

Results

The major findings of this study are organized along planning and communication of EQPs, leadership support and staff participation, monitoring and evaluation practices, and continuous quality improvement.

Planning and Communication of EQPs

Table 2. *Teacher educators' perceptions on planning and communication of EQPs (N = 302)*

No	Items	Frequency of Responses					Mean	S.D.
		SA	A	N	D	SD		
1	The college has clearly defined quality goals and objectives	12 4.0%	107 35.4%	22 7.3%	150 49.7%	11 3.6%	2.86	1.07
2	The college has clear strategies for implementing quality plans	19 6.3%	96 31.8%	25 8.3%	130 43.0%	32 10.6%	2.7	1.18
3	The management effectively communicates quality goals and implementation priorities.	21 7.0%	103 34.1%	38 12.6%	114 37.7%	26 8.6%	2.93	1.16
4	Educational quality plans are regularly reviewed to address emerging educational needs.	14 4.6%	154 51%	22 7.3%	90 29.8%	22 7.3%	3.16	1.12
	Total average	18 6.0%	118 39.1%	28 9.3%	111 36.7%	27 8.9%	2.96	1.15

Table 2 depicts teacher educators' perceptions regarding the planning and communication aspects of EQP implementation in the sampled CTEs. The overall quantitative findings indicated that teacher educators perceived planning and communication of EQP as moderate (M= 2.96; SD=1.15). A closer examination of the findings, however, revealed mixed perceptions. While 45.1% of participants agreed that planning and communication processes were effectively implemented, 45.6% expressed disagreement. These nearly comparable contrasting views suggest that the preparation, communication, and dissemination of educational quality plans were experienced inconsistently across the sampled colleges. Among the four individual items, strategies for implementing quality plans received the lowest rating (M=2.80, SD=1.18), whereas regular review of quality plans received a relatively higher rating (M=3.16, SD=1.12). The qualitative findings similarly revealed both efforts to implement educational quality plans and challenges in translating them into practice. Deans and vice deans acknowledged the existence of quality plans. They described various initiatives undertaken by CTEs to improve educational quality, including efforts to

enhance teacher educators' qualifications, improve facilities, and strengthen educational resources. REB senior experts also confirmed these efforts, noting that they provide short-term and long-term professional development opportunities to support quality improvement initiatives. A senior expert noted, "We work to improve the qualifications of teacher educators and to fulfill the needs of the CTEs. We also follow up with the colleges for an effective teaching and learning process" (SE-3).

Despite these efforts, deans and vice deans also identified significant challenges in translating quality plans into practice. In particular, they reported that policy changes were sometimes introduced with insufficient stakeholder participation and communication and with little consideration of institutional realities. Taken together, the quantitative and qualitative findings suggest that, although mechanisms for planning and communication were in place, they were not always effectively translated into coordinated institutional action. The findings therefore point to some inconsistency between the preparation and communication of quality plans and their translation into institutional practice.

Leadership Support and Staff Participation

Table 3. *Teacher educators' perceptions on leadership support & staff participation (N = 302)*

No	Items	Frequency of Responses					Mean	S.D.
		SA	A	N	D	SD		
5	Allocating adequate resources for implementing quality plans	16 .3%	57 18.9%	56 18.5%	123 40.7%	50 16.6%	2.56	1.13
6	Staff involvement in decision-making	22 7.3%	98 32.5%	61 20.2%	73 24.2%	48 15.9%	2.87	1.14
7	Staff involvement in quality-related activities.	16 5.3%	93 30.8%	67 22.2%	89 29.5%	37 12.3%	2.87	1.14
8	Collaboration among staff and management in implementing quality plans.	26 8.6%	107 35.4%	61 20.2%	71 23.5%	37 12.3%	3.05	1.19
	Total average	20 6.6%	89 29.5%	61 20.2%	89 29.5%	43 14.2%	2.80	1.18

Table 3 indicates teacher educators' perceptions regarding leadership support and staff participation in implementing EQPs at the sampled CTEs. The finding, with a mean score of 2.80 and a standard deviation of 1.18, shows a moderate level of leadership support and staff participation. However, only 36.1% of participants agreed that institutional leaders actively support EQP implementation and encourage staff participation, whereas 43.7% disagreed. These findings imply limited leadership commitment and insufficient staff engagement in implementing quality plans. Among the four items, adequate resource allocation received the lowest mean score (M=2.56; SD=1.13), indicating that resource constraints were another significant challenge to the implementation of EQPs.

The qualitative findings provide important insights into the level of management commitment and support in implementing EQPs in the sampled CTEs. Interview participants

recognized their efforts in implementing quality improvement initiatives. However, responses indicated that inadequate resources, limited staff participation, and weak collaboration restricted effective implementation. Internal quality inspection unit heads, deans, and vice deans noted that quality-related activities were inconsistently translated into day-to-day practices. The interview participants from CTEs and REBs revealed that budget scarcity affected nearly all aspects of college operations, including the implementation of planned activities, procurement of essential teaching materials, and improvement of educational facilities and student support services. Also, deans and vice deans in interviews explained that limited staff involvement, weak collaboration, insufficient institutional support mechanisms, and uneven stakeholder participation inhibit the effectiveness of quality improvement efforts. Viewed in combination, the quantitative and qualitative findings point to limited collaborative leadership and inadequate staff participation in decision-making and quality-related activities. The qualitative evidence further suggests that these challenges were exacerbated by limited institutional capacity, which constrains the effective implementation of quality improvement initiatives.

Monitoring and Evaluation Practices

Table 4. *Teacher educators' perceptions of monitoring and evaluation practices (N = 302)*

No	Items	Frequency of Responses					Mean	S.D.
		SA	A	N	D	SD		
9	The management regularly monitors activities related to educational quality.	20 6.6%	101 33.4%	46 15.2%	92 30.5%	43 14.2%	2.88	1.21
10	The college regularly conducts internal quality audits.	24 7.9%	77 25.5%	61 20.2%	86 28.5%	54 17.9%	2.77	1.23
11	Quality-related documents and implementation records are regularly updated.	22 7.3%	95 31.5%	60 19.9%	82 27.2%	43 14.2%	2.90	1.20
12	Student achievement data are used to improve educational quality	29 9.6%	124 41.1%	46 15.2%	62 20.5%	41 13.6%	3.13	1.24
13	The college has clear mechanisms for monitoring and evaluating educational quality plan implementation	19 6.3%	78 25.8%	63 20.9%	99 32.8%	43 14.2%	2.77	1.17
	Total average	23 7.6%	95 31.5%	55 18.2%	84 27.8%	45 14.9%	2.89	1.21

Teacher educators' perceptions of monitoring and evaluation practices related to implementation of EQPs in the sampled CTEs are presented in Table 4. With an overall mean score of 2.89 and a standard deviation of 1.21, the findings indicate a moderate level of monitoring and evaluation practices. Whereas 42.7% of participants disagreed that monitoring and evaluation

systems were effectively implemented, 39.1% agreed. These findings suggest that monitoring and evaluation activities were applied inconsistently across the CTEs, potentially limiting evidence-based decision-making, accountability, and continuous quality enhancement. The qualitative findings provide further insights into monitoring and evaluation practices in the sampled CTEs related to the implementation of EQPs. Senior experts from REBs, for instance, reported that colleges were regularly monitored and evaluated on a quarterly basis. They further explained that these activities involved various stakeholders, including REB officials, senior experts, college deans, vice deans, and department heads. Similarly, deans and vice deans from some colleges described established internal monitoring systems. In the words of one vice dean,

> *First, departments evaluate their performance and report to the academic vice dean. The vice dean then summarizes their reports and presents them to the college academic commission. Finally, the academic commission evaluates the reports at the institutional level and provides feedback to the department to address identified gaps. (VD-8)*

However, participants also aired concerns regarding consistency, depth, and effectiveness in improving quality. The interview participants from CTEs revealed weak internal quality inspection practices and the absence of external quality audits. The deans and vice deans, in particular, expressed dissatisfaction with the limited support and feedback provided by higher-level government bodies. A vice dean, for example, decried, "The inadequate and uneven internal quality audit practices and lack of external quality audits have weakened motivation for quality improvement efforts and influenced institutional accountability" (VD-8). Document analysis further revealed limited regulatory and quality assurance mechanisms. For example, internal inspection reports in a few CTEs have shown that institutional performance and quality of teacher education remained below expectations. The quantitative and qualitative findings converge to show that, although monitoring and evaluation systems had been established, their implementation was inconsistent. More importantly, the results suggest that these activities tended to be procedural and compliance-oriented, with limited use of monitoring findings to inform institutional improvement and enhance educational outcomes.

Continuous Quality Improvement

Table 5. *Teacher educators' perceptions of continuous quality improvement (N = 302)*

No	Items	Frequency of Responses					Mean	S.D.
		SA	A	N	D	SD		
14	The management continuously works toward improving educational quality.	26 8.6%	84 27.8%	57 18.9%	95 31.5%	40 13.2%	2.87	1.21
15	Implementation of educational quality plans contributes to improving teaching and learning quality.	47 15.6%	102 33.8%	38 12.6%	71 23.5%	44 14.6%	3.12	1.33
16	The management works for sustainable quality improvement	17 5.6%	73 24.2%	67 22.2%	109 36.1%	36 11.9%	2.75	1.12
	Total average	30 9.9%	86 28.5%	54 17.9%	92 30.5%	40 13.2%	2.91	1.22

Teacher educators' perceptions of continuous quality improvement practices in the sampled CTEs, presented in Table 5, point to a moderate level of practice, with an overall mean score of 2.91 (SD = 1.22). Nevertheless, 43.5% of participants disagreed that colleges regularly implemented continuous improvement activities, while 38.4% agreed. This suggests that systematic quality enhancement practices were not consistently sustained across the CTEs.

The qualitative findings demonstrated attempts by CTE to promote continuous quality improvement through internal quality assurance initiatives, self-evaluation practices, and feedback mechanisms. Deans and vice deans of a few CTEs reported their increasing emphasis on quality assurance as part of institutional improvement efforts. Document analysis further indicated that some CTEs had strategies for internal evaluation and assessed selected activities using checklists and feedback systems to identify areas requiring improvement. Despite these initiatives, participants noted considerable limitations to implementing continuous quality improvement practices. The integrated findings show CETs, albeit engaged in assessments and follow-up activities, lacked systematic procedures for using evaluation and quality audits to strengthen overall performance. Since continuous improvement is a fundamental component of quality management, such limitations may hinder the long-term effectiveness and sustainability of quality improvement efforts.

Discussion

This study was designed to explore the implementation of EQPs in Ethiopian CTEs through a convergent parallel mixed-methods design. The integration of the quantitative and qualitative findings indicates that the implementation of EQPs in Ethiopian CTEs remains partial and inconsistent. Although the quantitative findings generally indicated moderate mean scores across the four implementation dimensions, the qualitative evidence revealed persistent institutional weaknesses that limited effective implementation. Specifically, inadequate planning and communication, weak leadership support, limited staff participation, inconsistent monitoring and evaluation, and fragmented continuous quality improvement practices collectively constrained the

institutionalization of educational quality plans. The convergence of the two datasets suggests that the key challenge for effective implementation of quality plans lies not in the existence of quality plans but in the institutional capacity to translate them into sustained practice.

One important finding that clearly stands out relates to planning and communication. The findings indicate that colleges generally have quality plans, goals, and some mechanisms for communicating them. However, participants consistently described a substantial gap between documented plans and actual practices. The findings made it clear that the implementation of institutional quality initiatives was constrained by frequent policy changes, limited stakeholder engagement, and weak communication. Since Ethiopian CTEs work under REBs while simultaneously implementing national policies, quality planning becomes more compliance-oriented than a strategic management process. Consequently, CTEs may be compelled to focus on fulfilling administrative requirements instead of using quality plans as instruments for institutional enhancement. This finding is consistent with literature (e.g., Sallis, 2014; Whalley, 2019) which suggests that quality plans do not guarantee successful implementation; rather, effective implementation requires clearly defined policy frameworks, active stakeholders' consultation, and effective communication systems.

The integrated findings also show that management commitment and staff participation remain the main challenges to effective implementation. The college leaders revealed that leadership structures were in place and the management generally shows commitment to quality improvement. Nevertheless, participants identified that inadequate financial resources, limited staff participation in decision-making, and weak collaboration between management and staff hindered implementation. These challenges reflect institutional realities within Ethiopian CTEs, in which colleges have limited financial autonomy and largely depend on regional government allocations. A leadership commitment alone cannot ensure fruitful implementation without adequate institutional support and resources. These results align with literature on quality management, which highlights the importance of leadership dedication, resource allocation, and stakeholder participation for effective implementation (e.g., Deming, 1986; Psomas & Antony, 2017).

Concerning monitoring and evaluation, the study found that CTEs had monitoring and evaluation practices, performance reviews, and reporting mechanisms. However, these monitoring practices were often compliance-oriented and insufficiently linked to improvement actions. Despite quarterly reporting systems and evaluations in some colleges, an absence of regular internal quality audits, weak external quality review mechanisms, and limited follow-up reduced the effectiveness of monitoring and evaluation systems. The convergence of these findings indicates that monitoring and evaluation activities were frequently treated as administrative reporting requirements rather than mechanisms for institutional learning and improvement. Thus, the check stage in Deming's PDCA model remains immature, weakening the continuous improvement cycle (Deming, 1986).

The combined findings further revealed weaknesses in continuous quality improvement practices. Although some colleges had established internal quality inspection units and used feedback mechanisms to support improvement, these practices were not consistently institutionalized. Participants emphasized that the absence of external quality audits, limited performance review systems, and weak corrective-action mechanisms were obstacles to sustainable quality enhancement. Literature regarding quality management emphasizes the importance of systematic use of evaluation, feedback, and corrective actions to enhance institutional performance over time (Deming, 1986; Sallis, 2014). However, improvement initiatives in the Ethiopian CTEs were often uneven and lacked sustainability. Overall, the quantitative and qualitative findings show strong convergence. The qualitative findings support the quantitative results by explaining that institutional leadership, resource availability, stakeholder participation, communication, monitoring systems,

and organizational commitment influenced implementation. These findings suggest that EQPs in Ethiopian CTEs were implemented within an environment characterized by frequent policy changes and low institutional commitment to quality. The findings further suggest that EQP implementation requires moving beyond compliance-oriented quality assurance toward institutional quality management. Moreover, CTEs should improve institutional effectiveness and prepare competent teachers capable of contributing to national educational development.

Conclusion

This study examined the implementation of educational quality plans in Ethiopian CTEs. The findings demonstrate that EQPs are formally established and, to some extent, implemented in the sampled colleges. Despite these quality plans and related structures, qualitative evidence revealed persistent gaps between policy intentions and institutional practice. These gaps were associated with limited leadership commitment, resource constraints, inconsistent monitoring and feedback, and weak institutional support for continuous improvement. The findings have important theoretical implications for educational quality management. They show that effective implementation of EQPs depends not only on the existence of quality plans but also on integrating planning, leadership, monitoring, and continuous improvement into institutional practice. By conceptualizing EQP implementation through these four dimensions, the study provides a practical framework for understanding and assessing implementation in CTEs. The findings also strengthen quality management principles and support the view that formal policies alone are insufficient; they must be effectively translated into day-to-day institutional practices. The study also provides important practical implications. It emphasizes the need for CTEs, REBs, and the MoE to strengthen leadership commitment, improve communication of quality plans, establish regular monitoring and feedback systems, and promote a culture of continuous quality improvement. Strengthening these implementation processes can improve institutional effectiveness, accountability, and the quality of teacher preparation, thereby contributing to broader educational improvement. Overall, the study demonstrates that the success of educational quality reforms in Ethiopian CTEs depends primarily on institutional implementation capacity. The findings provide evidence to support institutional leaders, Regional Education Bureaus, and the Ministry of Education in strengthening quality management systems and advancing sustainable educational improvement.

Recommendations

1. Colleges of teacher education should improve communication, stakeholder participation, and implementation follow-up mechanisms to strengthen the alignment between quality plans and institutional practices. Genuine participation of teacher educators in planning and decision-making may enhance ownership and commitment to quality initiatives.
2. Regional states/education bureaus should allocate adequate resources (financial and material) to the CTEs. Particular attention should be given to educational resources, ICT infrastructure, laboratories, libraries, and student support services. Regional education bureaus should also provide adequate technical support to facilitate the implementation of educational quality plans.
3. Colleges should strengthen monitoring and evaluation systems based on evidence-based decision-making, regular internal quality audits, and systematic follow-ups. They should use monitoring activities for quality improvement rather than only fulfilling reporting requirements.
4. CTEs should work to improve continuous quality through regular performance reviews,

stakeholder feedback systems, corrective-action procedures, and institutional learning practices. They should use assessment results to improve planning and quality-enhancement efforts.

5. Policymakers should consider external quality audit mechanisms for colleges of teacher education. Independent external evaluations may enhance accountability, provide objective feedback, and support continuous institutional improvement.

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Planning For Engagement: Program Revision Using Video Analysis Data

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Abstract

Universal Design for Learning (UDL) has been a framework for accessible instruction for over 40 years. With so much variety in the ways UDL can be facilitated by teachers, the options are endless for providing personalized instruction for students of all ability levels. However, this variety of available strategies also creates uncertainty about the extent to which these strategies are incorporated into Teacher Preparation Programs (TPPs). The current study sought to identify UDL Engagement strategies currently present and those missing from Teacher prep coursework. Video analysis was used to collect data. Fifteen videos from across three student teaching cohorts were analyzed to identify engagement strategies used during student teaching placements. These strategies were then categorized by courses in which they were explicitly and implicitly taught. Findings suggest that while multiple engagement strategies are accounted for in TPP curricula, more explicit instruction and modeling are needed to make an enduring impact on teacher candidates. Suggestions for implementation by teacher preparation program faculty are included in the Discussion.

Keywords: Video analysis, Teacher Education Preparation, Student Teaching, Reflection, Instructional Practices

Introduction

Universal Design for Learning (UDL) has become the framework for accessible education practices across the United States and the world (Almeqdad et al., 2023; Wells, 2022). Within the three principles of UDL, Engagement, Representation, and Action and Expression, multiple considerations are presented to support learners, provide access to learning, and increase students' executive functioning. While Universal Design is now a component of coursework in most Teacher Preparation Programs (Gentile, 2022), we are still seeing teacher candidates struggle with implementing engagement strategies during the final stage of their clinical practice, student teaching (Dolma & Thinley, 2022; Menon & Ngugi, 2022). For example, Dolma and Thinley (2022) found that student teachers are in favor of a social constructivist theory of teaching mathematics, lending to more diverse teaching methods. However, these same student teachers did not incorporate these methods into their fieldwork lessons (Dolma & Thinley, 2022). Additionally, in Menon and Ngugi (2022), student teachers recognized a lack of engagement after watching their own teaching videos. The student teachers were able to identify alternative ways to improve their students' engagement in future lessons (Menon & Ngugi, 2022).

With four decades under its belt, Universal Design for Learning (UDL) can hardly be considered a new concept in Education. In fact, UDL is just about the same age as the average US teacher (NCES, 2024). However, the research tells us teachers are still looking for professional development support to employ UDL guidelines and considerations in their classrooms consistently (Jansen et al., 2023; Nagro et al., 2019). Logic tells us that if teachers are still unable to execute

UDL strategies effectively and purposefully, student teachers are not seeing these tactics modeled in the field. UDL's mid-life crisis puts Teacher Preparation Programs (TPPs) in an essential position to explicitly teach the guidelines and considerations and lead by example through meaningful modeling.

Literature Review

Teacher Preparation

Lack of confidence with the Engagement considerations is widespread and encompasses a variety of grade levels and disciplines within Teacher Preparation Programs. Livers and colleagues (2021) found elementary preservice candidates felt a lack of preparedness for multiple reasons. One hundred forty-three elementary teacher candidates completed a survey with open-ended questions regarding their feelings toward "preparedness" for the field. Not surprisingly, "supporting all learners" and "classroom management" were areas of concern for the teacher candidates in this year-long study. Optimize challenge and minimize threats and distractions are just two of many Engagement considerations that apply to these areas. Reasons for these concerns included a lack of strong mentors and involvement during field placements. While participants noted that practicing in a variety of placements had a positive impact, the absence of a strong mentor/cooperating teacher and infrequency of actual involvement with children in the classroom negatively impacted their preparedness for teaching. In terms of coursework, participants noted practical applications of strategies as missing from professors' assignments and lectures. Active learning of practical skills was identified as a key to teacher candidates' confidence with certain topics such as lesson planning, in contrast to assessment, which lacked active learning activities for knowledge acquisition.

In a 2013 study by Kearney and Maher, teacher candidates worked on their "preparedness" by improving their integration of technology into their fieldwork experiences. Sixteen mathematics education pre-service candidates participated in the study aimed at integrating iPads into their math lessons. Through qualitative analysis, Kearney and Maher (2013) found that the teacher candidates prioritized two concepts within their journal entries and focus groups. Firstly, utilizing the iPads to identify real-world examples allowed for a sense of authenticity (UDL consideration 7.2). In addition, the use of iPads in the classroom enabled the children to become more reflective learners (UDL consideration 9.3) as they gathered evidence of their own learning. As with the Livers et al. study (2021), it was found that teacher preparation programs embracing specific strategies and techniques through active learning instilled more confidence in teacher candidates to employ similar strategies.

Indeed, modeling and strong mentorship are a theme carried over to a Hills and Sessoms-Penny (2021) study in which 154 preservice and in-service teachers were surveyed about professional development. Ten participants were interviewed for follow-up information and discussed the need for field placements with cooperating/supervising teachers who are willing to allow their teacher candidates to try new ideas. The cooperating teacher must be open to new concepts and techniques and should also be accommodating to teacher candidates who are in fact "students" trying to learn these techniques through active participation. Another point of contention for the participants was the lack of relevance (UDL consideration 7.2) in many of the professional development opportunities offered through districts and Institutions of Higher Education. When attending professional development activities that lacked specific connections between content and real experiences, participants reported zero impact on their professional growth.

Program Evaluation

Program evaluation is not a new concept in TPPs; however, there is limited research on the processes and impact of such assessments (Afacan, 2022; Garcia et al., 2025). Program evaluations serve to identify best practices within the college classroom, as well as professional development needs of faculty (Bland et al., 2025). In addition, these reviews can serve to pinpoint areas for new resource allocation and serve as accountability checks for the entire department (Hemamalini et al., 2024). Systematic program evaluation helps departments make data-driven decisions for continuous improvement of student outcomes (Bland et al., 2025; Garcia et al., 2025; Hemamalini et al., 2024).

A common thread amongst recent program evaluations is establishing a framework or criteria for review, from state ratings (Comb et al., 2023) to globally recognized models such as the KirkPatrick model (Hemamalini et al., 2024). By creating or utilizing standing criteria, reviews can remain objective and focused. Engagement has been a central focus of academic circles in recent post-pandemic years (Bradford & Norman, 2022; Jansen et al., 2023; Smith & Schlaack, 2021). The current study utilized the 2.2 UDL considerations (CAST, 2018) as evaluation criteria. The authors set out to explore what engagement strategies our student teachers were using in order to determine the correct path for course revisions and professional development opportunities. Prior studies utilized a range of data collection methods for program review (Afacan, 2022; Bland et al., 2025; Comb et al., 2023; Garcia et al., 2025; Hemamalini et al., 2024). The authors of the current study hope to expand upon this research by utilizing video analysis as a form of observational data from student teaching placements to address the following research questions:

RQ1: What engagement strategies are student teachers using the most and least?
RQ2: What changes can be made throughout our teacher preparation courses to encourage an increase in engagement strategies used by student teachers?

Methodology

Data collection

Each semester, teacher candidates (TCs) in their final field placements (student teaching) at a small, private northern university are required to video record a minimum of two lessons through the use of Vosiac video feedback and analysis software. Vosaic is a video platform which enables video coaching, observation, and analysis of classroom teaching. These videos are reviewed by a minimum of two members of the Education Department as one component of the candidate's Teaching Performance Assessment, the "final exam" prior to graduation from any of the institution's Education programs. The entire department has access to the videos, and the department conducts an overall group evaluation discussion once individual results are compiled and scores have been confirmed. The overall group evaluation discussion entails identifying strengths and areas in need of improvement by the group as a whole. The department discussion then leads to revisions made to the assessment itself to enhance clarity in the tasks and rubrics.

A total of 25 videos from three consecutive cohorts, Spring 2023, Fall 2023, and Spring 2024, were collected for this study. Videos were alphabetically labeled A to Y for anonymity. Through random selection of available videos, five videos were selected from each cohort for analysis. Observation data were collected for the first 15 minutes of each video in order to maintain consistent collection procedures. After conversations with the university's Institutional Review Board, it was determined that IRB approval was not required due to the nature of the presentation of information within this study. This inquiry was designed to improve instructional practices and examine the potential impact of teaching Universal Design for Learning (UDL) on preservice teachers' use of

engagement strategies. The study involved comparing de-identified teaching videos collected as part of required coursework from student teachers who had and had not taken the Instructional Design course, without altering instruction, interacting with participants, or sharing videos. Based on IRB guidance, the project was eligible for exemption, with student consent required for the use of videos in research. Consent was collected through an electronic form and kept in the primary investigator's secure drive. While TCs were identifiable through their videos, only anonymous descriptions of portions of videos will be discussed as evidence exemplars. The engagement strategies used and not used were the focus of the video analysis and not the particular participant.

Training

Videos B and W were selected for training after the study set was selected, to ensure reliability between researchers (the authors). Each training video was watched independently and analyzed using Figure 1. Time stamps were recorded to ensure co-researchers were identifying the same classroom occurrences. The co-researchers then met to compare and clarify records. Inter-rater reliability was calculated using the percent agreement formula, widely used as a straightforward snapshot of data alignment. After the first training video, interrater reliability was calculated to be very low, 37%. The researchers met and discussed the variability in scoring and the definitions of particular UDL considerations. The authors discovered they had each identified accurate instances of the Engagement strategies; however, at different timestamps within the training video. A variation in the process of inter-rater reliability had to be established. The authors conducted a reliability score for each tracking sheet. After scoring the video, each author had to review the video using the other author's scores and timestamps. Reliability was calculated based on whether the authors were in agreement for each sheet rather than the total number of agreements at the exact, precise times of occurrences within the video. Reliability scores from the two sheets were then averaged for a reliability score for the video. Researchers were in 100% agreement after reviewing the time stamps of the other rater. Training video two was used in the same way, with each researcher conducting a review of the video and then a review of their co-researcher's tracking form. Again, 100% agreement was achieved. Due to the extensive interpretations of, and variety of activities that can be executed to display each engagement consideration, the researchers agreed to continue viewing videos and discuss any strategies that scored below a 70% interrater agreement.

Figure 1. *Data collection sheet*

Video #_____		Scorer 1 or 2 (circle option)	
Strategy	Quantitative counts	Time stamps	Qualitative Comments
Recruiting Interest			
Optimize individual choice and autonomy			
Optimize relevance, value, and authenticity			
Minimize threats and distractions			
Sustaining Effort & Persistence			
Heighten salience of goals and objectives			
Vary demands and resources to optimize challenge			
Foster collaboration and community			
Increase mastery-oriented feedback			
Self-Regulation			
Promote expectations and beliefs that optimize motivation			
Facilitate personal coping skills and strategies			
Develop self-assessment and reflection			

Data Analysis

Once observations were complete, inter-rater reliability was calculated using the formula discussed above. The researchers then met to discuss and rectify scoring to a minimum of 70% agreement where necessary. To report out exemplars for this paper, the researchers discussed common occurrences for each Engagement consideration and selected one video to discuss in detail that illustrated each consideration. Once agreement was established, the researchers also utilized total event counts to identify and create lists of the top five "Most used" and "Least used" considerations. This established an answer for RQ1: W*hat engagement strategies are student teachers using the most and least*, while forming our criteria for course review.

To address RQ2: *What changes can be made throughout our teacher preparation courses to encourage an increase in engagement strategies used by student teachers*, the researchers used the "Least used" list generated for RQ1 to review their own undergraduate courses independently (four courses each; see Table 1). The original task in this review was to identify more opportunities within these courses to model and/or practice the "least used" engagement strategies. Once these opportunities were identified, the authors came together for discussion of any themes that may have arisen when reviewing the courses. Themes and possible activities to embed within these courses are discussed in our findings.

Table 1. *Undergraduate courses included in review*

Course title	**Level in program**
Arts, movement, and music for the young	Foundational
Instructional design	Foundational
Methods and materials: Art (Elementary Education)	Field/Practicum
Methods and materials: Art (Middle School)	Field/Practicum
Methods and materials: Art (Secondary Education)	Field/Practicum
Classroom management	Field/Practicum
Inclusive methods	Field/Practicum
Teaching to the standard (Capstone course)	Student teaching

Findings

Regarding RQ1, Teacher candidates displayed engagement strategies in numerous and various ways during their student teaching placements. The findings below are reported in two categories: "Most used" and "Least used" considerations (Table 2). In view of the fact that the course review focused on "Least used" strategies, findings and discussion will focus primarily on the latter strategies.

Table 2. *"Most" and "Least" used UDL Engagement considerations*

"Most used" Engagement considerations (#)	"Least used" Engagement considerations (#)
• Minimize Threats and Distractions (7.3) • Heighten Salience of Goals and Objectives (8.1) • Vary Demands and Resources to Optimize Challenge (8.2) • Increase Mastery-Oriented Feedback (8.4) • Promote Expectations and Beliefs that Optimize Motivation (9.1)	• Optimize Individual Choice and Autonomy (7.1) • Optimize Relevance, Value, and Authenticity (7.2) • Foster Community and Collaboration (8.3) • Facilitate Personal Coping Skills and Strategies (9.2) • Develop Self-assessment and Reflection (9.3)

Least Used Engagement Strategies

To select videos for this narrative, the researchers looked for explicit models of implementation. The videos used in this section were ofttimes the only example available due to the lack of application of these five considerations.

Optimize Individual Choice and Autonomy (UDL consideration 7.1)

Choice has long been connected with diverse learning styles and enhancing student empowerment and self-determination (Collier, 2010; Newman et al., 2021). Bruce et al. (2013) credited choice for student writers' increased attempts at work completion.

> *Teacher candidate begins the anticipatory set of the lesson with a journal prompt, "Which Enduring Issue relates to the situation in Berlin during the Cold War?" The teacher candidate then reminds them of the list of Enduring Issues and repeats the prompt, "Connect an Enduring Issue you know about to the Berlin Wall." Teacher candidate then explains that this journal prompt will relate to today's lesson content. A few minutes are provided for students to complete their journal entries. "Ok, who wants to share and explain why you selected that enduring issue?" Students take turns sharing out their journal responses. (Video Y)*

The TC is seen providing choice in two ways. First, the TC allows students to choose which Enduring Issue they would like to connect to the Berlin Wall. The Enduring Issues list is broad enough to allow students to make connections to multiple issues; therefore, there is not a "wrong" answer for this prompt. Their choice is not only empowering and motivating, but it is also safe from judgment. The second instance of choice is after the journal writing is complete, when the TC asks, "Who wants to share…" Students who feel positive about their answers will volunteer to speak, while those who may be timid, unsure, or just not very verbal in class can sit back and absorb classmates' responses.

Optimize Relevance, Value, and Authenticity (UDL consideration 7.2)

By optimizing relevance, value, and authenticity, educators not only incorporate an important Universal Design for Learning procedure, but also a culturally responsive practice (Hollie, 2015). Based on schematic learning (Inhelder & Piaget, 1958), providing an authentic and/or relevant context for learning increases the probability of engagement and learning (Pritchard, 2018).

The class is wrapping up a unit on monochromatic portraits. The TC tells the class they will be doing a gallery walk to showcase their work to peers anonymously. They will then reflect on the project as a whole. The TC explains the gallery walk procedures and starts the activity. While students are rotating from painting to painting, the TC reminds them about the monochromatic components: "Look at the brush strokes, look at the colors, look at the blending, all the stuff you were thinking about in your portrait, now look at this random person's portrait and see how they did it." (Video C)

By facilitating the gallery walk activity and using guided prompts about monochromatic components, the TC has provided relevance to the activity in a couple of ways. The prompts ensure the feedback students are providing classmates is relevant and is therefore valuable information for the artist. The gallery walks and prompts combined aid the students during the closure activity, which is a reflection about the unit. Through the Gallery Walk activity, students now have multiple authentic examples to refer to during their reflection. The prompts provided them with relevant vocabulary to use in the reflection in order to demonstrate their content knowledge.

Develop Self-assessment and Reflection (UDL consideration 9.3)

Self-reflection is significantly linked to academic performance (Nelson, 2021; Papanthymou & Darra, 2023). Behaviorally, we learn when we reflect on our experiences (Hollie, 2015). Reflection is a learned process for most of us, as is self-assessment or self-monitoring, requiring specific prompts and direction (Nelson, 2021; Collier, 2010; Rapp, 2014).

Teacher candidate begins the lesson by writing the number 35 on the board and asking students, "who can tell me what this number is?" Student replies, "35". "Yes, 35 and it has a tens and a ones. Who can show me?" Same student comes to the board and labels the tens and ones. "Tell them [the class] what you did." Student explains her labeling process to the class. Instruction continues with some samples and then TC asks the students to complete some problems on a worksheet independently. After a few minutes, the class returns to the whole group for review. One student is singing to himself. "Aiden, are you ready?" prompts TC. "Yea, I am totally ready." Review continues. As the class finishes one problem, TC states, "make sure your paper looks like mine." (Video A)

In Video A, we see reflection and self-assessment instruction. The TC asks the student at the board to reflect on her labeling process in the form of a think-aloud for the rest of the class. This think-aloud also allows her classmates to reflect and self-assess independently. The TC prompts a student to self-assess his readiness when he appears off task. Finally, the TC asks the class to self-assess their work by asking them to refer to the TC's model problem on the overhead projector.

Facilitate Personal Coping Skills and Strategies (UDL consideration 9.2)

Coping skills help students develop problem-solving skills, providing them with self-control and ownership over situations (Collier, 2010). Students with emotional coping skills are less likely to experience depression or anxiety (McConkey & Kuebel, 2022). While much of the literature around this consideration focuses on emotional coping, the current study extended the definition to include academic coping strategies, such as metacognitive strategies for learning.

While teaching about maps, TC reviews vocabulary for approximately 5 minutes as a whole group. Class then takes turns reading content from the textbook aloud. The textbook asks the class to find "zoo". TC instructs the class to place their

pointer finger on the symbol of "zoo" in the map key. TC then instructs students to move their fingers around until they find the symbol in the map itself. "And that's how you read a map!" TC practices with a couple more symbols in the map key, also referring to it as a map legend. TC introduces the map compass. TC points to each direction and has the class repeat each direction, "North, East, South, West". "Now, to remember that the North, East, South, and West go in a specific order, which can be kinda hard to remember, so that's why we come up with some fun ways to remember. So I'm going to teach you guys a fun way to remember it. Something I was taught is "Never Eat Soggy Waffles." Many students get excited; some shout out, "that's what I use!" "I can hear your excitement, so why do you think we do that?" Students raise their hands; a student responds, "Because it is hard to remember." "Yea, it's hard to remember the order North, East, South, West goes in. So if you remember a funny saying, the first letter of each of those is how it goes: Never Eat Soggy Waffles, because who wants to eat soggy waffles? So, what do we remember?" Students respond "Never Eat Soggy Waffles." "And what does that stand for?" asks the TC. "North, East, South, West," students respond. "Yes, very good. Give yourselves a round of applause." Class and TC clap hands in a circular motion. (Video J).

The TC in Video J provides an academic coping strategy by teaching the students a mnemonic strategy for remembering the cardinal directions. TC conducts a think-aloud to acknowledge that the order of the directions can be difficult to remember and suggests this coping strategy for students who need it.

Foster Community and Collaboration (UDL consideration 8.3)

Collaboration provides increased support for students (CAST, 2018). Studies show, structured collaboration improves academic performance, acceptance, and confidence (Fuchs & Fuchs, 2005; Ingman et al., 2022; Naudé, et al., 2022).

"Sometimes we reread for what reason?' asks the TC. "Refresh your memory," student responds. "Refresh your memories, remember all those details, sometimes we missed something yesterday. Yesterday we popcorn read, today you are going to read with your partner the same story. So, when I tell you to find your reading partner, what story are you reading?" "The List," students respond. "Lea and Benji, you will be reading The List for the first time with your partners, and pay attention to those character traits we've been talking about. Think about Frog, think about Toad. What do they have in common, maybe. What's the same about them? Remember we talked about Toad being organized? Think about those traits. I'm going to send you back to your desks. You are going to grab your Frog and Toad book. Then you are going to find your partner…" Co-teacher checks who has a partner. TC models "So if I was reading with Grace, I would read page one and Grace would read page two. Then I would read page three and Grace would read page four. So take turns reading and listen to what each other are saying." TC sets a timer and moves students into partner reading groups. TC helps pairs find space around the room to read. (Video X).

The TC in this video provides clear directions to pairs for collaboration during the reading activity. In addition to explicit directions, the TC models how to take turns to demonstrate expectations for their collaborative efforts. Lastly, the TC facilitates the collaboration by helping students find comfortable, appropriate spaces in the classroom for the partner reading activity.

Course evaluation

When the "Least used" strategies list was applied as a course evaluation criteria, the authors noted several opportunities to utilize these strategies were already present within these courses. Examples of present opportunities are reported here.

Optimize Individual Choice and Autonomy (7.1)

Through careful articulation of course modules, professors in the teacher preparation program intentionally implemented practices that align with UDL consideration 7.1 by providing teacher candidates with meaningful opportunities to make decisions about their learning. Observations across courses included presenting students with a choice of previously developed lesson plans to use for poster presentations and final lesson analysis assignments, allowing for the selection of topics that align with their interests and professional goals. In Instructional Design, students selected words for Word Wall activities, based upon their academic subject interests. While in Classroom Management student groups select the grade level for developing Positive Behavioral Interventions and Supports (PBIS) plans. Candidates enrolled in other courses selected an Individualized Education Program (IEP) for analysis and reviewed artifacts that best demonstrated their growth and skills within their professional portfolio used for entrance into the workforce. In regards to fieldwork placements, a Google Form is distributed via email prior to each semester to each enrolled student to gather information regarding students' living locations, transportation needs, and placement preferences, ensuring that field experiences accommodate individual circumstances whenever possible. Lastly, during lesson planning assignments, students are allowed the choice in selecting the grade level, New York State Learning Standards, and lesson focus, fostering ownership of the learning process while promoting engagement, motivation, and self-directed professional development.

Optimize Relevance, Value and Authenticity (7.2)

Experiences aligned with UDL consideration 7.2 demonstrated both the purpose and authenticity of the knowledge and skills developed throughout the teacher preparation program. This consideration was integrated by linking course activities to teacher candidates' professional interests. Lesson plans and instructional products were tailored to reflect certification areas and career goals in visual arts, early childhood, elementary, and secondary education settings. In classroom management courses, students developed Positive Behavioral Interventions and Supports plans and selected scholarly articles to support their content. Instructional Modules from the IRIS Center were customized to contain an array of grade levels and educational content, allowing candidates to explore scenarios solely based upon their interests. Authentic learning experiences included parent-teacher conference simulations with real actors, IEP meeting simulations, and student-teacher introduction flyers that were distributed to families at the beginning of mentorship. Activities, such as a Virtual Field Trip and Professional Experience reflections, allowed students to choose sites and opportunities that aligned with their interests and career aspirations. Investigating local traditions and observances, selecting articles for discussion, and touring the Visual and Performing Arts University Galleries encouraged candidates to connect course concepts to real-world educational, cultural, and community contexts.

Foster Community Collaboration (8.3)

UDL consideration 8.3 was observed through small group Theorist Scavenger Hunts, weekly article jigsaw activities, partner-based poster presentations, PBIS, and word wall activities. Working with a single or group of colleagues provides opportunities for learners to engage with peers, share perspectives, and build a sense of belonging within the learning environment. Co-teaching the

development of lesson plans and engaging in IEP simulations allow students to exchange ideas, provide feedback, and solve problems that arise. Peer-reviewed activities throughout the program, such as portfolio and Teacher Performance Assessment reviews. Student participation in art shows that highlight local non-profit, community-based art organizations or educational settings that work with an array of abilities was also observed. Guest Speakers from the local community who share the same vision are an asset to working effectively with education-based communities. Professional Development webinars from local stakeholders also contribute to this principle.

Facilitate Personal Coping Skills and Strategies (consideration 9.2)

This engagement strategy was present in seven of the eight courses reviewed. Instructional Design was the only course missing an opportunity for this type of engagement currently. During the Arts Methods courses, strategies for managing frustration are taught using creative expression through the arts as one method of releasing stress. Along with this is the embedded idea that art takes revision. Reframing "mistakes" into drafts of work rather than a final product alleviates anxiety and emphasizes progress over perfection. Instructors further support a growth mindset by encouraging students to view mistakes as opportunities for learning and improvement through assignment revisions, allowing them to reflect on feedback, refine their work, and demonstrate increased mastery of course content. To further develop executive functioning skills, time management strategies were implemented, as professors modeled the process of how to break large assignments into smaller, manageable tasks and create realistic timelines for completion. Within the Art Methods courses, lesson plan instruction was broken down into smaller weekly sections, as was the Positive Behavior Intervention Support plan in the classroom management course. In the Inclusive Methods course, where collaboration is a key instructional goal, TCs rate themselves and journal about their personal problem-solving and communication skills. During Teaching to the Standards, collaboration and problem-solving again are highlighted skills. Each class session begins with a student teaching debrief. The TCs talk about their week in the field and share out any concerns that arose. The group works through the problem to identify several strategies for their fellow TC to use the following week. At the end of each class, TCs are invited to stay for 1:1 meetings with the instructor to continue the conversation or discuss more private, individual issues.

The most pronounced opportunities for this strategy are during the classroom management course. Weekly wellness activities have been built into this course to explicitly teach personal coping strategies. TCs journal weekly to start the class session. Other activities include creating an "emotional support tree", much like a phone tree to identify personal and community contacts they can reach out to in times of need. In another example activity, TCs create personalized snow globes. When the "snow particles," resembling life's stressors were shaken, the chaotic scene is meant to represent the TC's mind, busy and messy. As the particles gradually settled to the bottom, the scene became clear once again, providing a visual reminder that moments of chaos and uncertainty can be temporary and that calmness, clarity, and perspective can be restored over time. This reflective activity encouraged students to consider strategies for managing stress and maintaining their well-being as future educators.

Develop Self-assessment and Reflection (consideration 9.3)

The Education department's standard lesson plan includes a Lesson Rationale section in which TCs must justify their pedagogical choices through the lesson/unit they created. This section of the lesson plan implores TCs to identify research that supports their selected instructional procedures, materials, and accommodations provided. This activity is used in Instructional Design as well as

all the Art methods and the Art and Movement courses. Also included in the Instructional Design course is the use of exit tickets each week. TCs are asked to identify three things they learned for the week and two questions they still have about the week's content. This allows TCs to self-assess their learning for the week and allows the instructor to clarify any misconceptions gained during the week's instruction.

Another reflection activity completed in multiple courses is the simulation reflection activity. Written and verbal reflections encourage teacher candidates to analyze strengths, challenges, and progress toward course objectives or professional goals in a systematic way. A culminating activity in Inclusive Methods and Classroom Management is a Parent meeting simulation. After these meetings occur, TCs are asked to complete a reflection regarding their own strengths and areas of improvement for future parent meetings. Completing micro-teaching rationales requires teacher candidates to analyze instructional decisions, evaluate effectiveness, and identify areas for continuous learning and improvement. Through this process, TCs reflect on why they chose specific teaching strategies, learning activities, assessments, and classroom management techniques, becoming more intentional and self-aware practitioners.

Discussion

The UDL Engagement strategies (CAST, 2018) were used throughout the viewed student teaching videos to varying degrees. This aligns with practices TCs are seeing in their teacher preparation coursework prior to student teaching (Yaqoubi et al., 2022). The Findings described instances of five of the Engagement strategies being used in classroom settings by our TCs, as well as ways in which Instructors are using these same strategies in our teacher prep courses. The strategies identified as "most used", while not the primary focus of the current study, generated an interesting hypothesis about these considerations. The "most used" strategies tend to flow very easily into a lesson with little to no prior planning of said strategy. For example, the TC from Video R did not necessarily write "walk up and down the rows and provide direct instruction to late students" into their lesson plan; however, when the students arrived, the TC instinctively went to them to provide directions. It could be suggested that the "least used" strategies discussed below take more advance planning in order to execute. The five "least used" strategies' videos were difficult to identify, and for some strategies, there may have only been a singular exemplar available for illustration purposes. In this Discussion, we will address these five strategies and how Instructors can use them in teacher prep courses to better model and therefore allow for more exposure to said strategies. Next steps in our program review will also be discussed.

New opportunities within courses

Having course professors explicitly model Universal Design for Learning (UDL) engagement strategies is an essential practice in teacher preparation. It allows teacher candidates to observe not only what effective instruction looks like, but also to become confident in the UDL framework and vocabulary. When professors in Teacher Preparation Programs demonstrate UDL strategies with intention and correct classification, they make the principles clear and showcase the ability to apply this framework to authentic classroom environments. For instance, when teaching the progress of collage *(an artistic composition, created by combining different materials to make a holistic piece of artwork)*, a course professor of Arts Methods has their students select imagery from magazines that are symbolic to the teacher candidate. During the instructional process, the course professor states that this exercise directly aligns with UDL consideration 7.1, Optimize Individual Choice and Autonomy. The professor then asks, "In a classroom of your own, what other activities could

you direct that would support this principle?" A think-aloud then transpires that affirms that choice provides students with a sense of empowerment and increased motivation (Collier, 2010; Bruce et al., 2013; Newman et al., 2021; Traga Philippakos, 2021) and that Instructors can use choice in teacher prep courses each and every day (CAST, 2024).

New opportunities within courses include allowing students to have a choice regarding "How" students demonstrate their learning in module outcomes. For instance, students would have a choice regarding writing a paper, creating a podcast, or creating a multimedia presentation for evaluation. Having students develop lesson plans for real populations could also deepen the investment in curricular outcomes. Adding comprehensive wellness checks either weekly or during segmented time intervals of the class would not only promote self-regulation and self-awareness but strengthen student-faculty relationships. These check-ins demonstrate that course professors value students as individuals and want to create a sense of belonging within the classroom community. Lastly, the addition of Exit Tickets throughout course develop not only develop self-reflection and assessment but connect to UDL consideration 7.2 allowing the content learned to connect to real-world applications.

Next steps in program review

There are many steps to complete in order for a full program review to be accomplished. This review began small, with the authors utilizing a select few courses they themselves teach. Inviting department colleagues into the discussion is a sensible next step (Feuer et al., 2013; Zeichner et al., 2024). This would serve two purposes. It allows for more courses to be reviewed for Engagement strategy use. It also brings diverse perspectives to the conversation, possibly identifying new opportunities the course instructor had not thought of. Another step in the process is to review field experience courses (Zeichner et al., 2024). At our institution, TCs engage in foundational fieldwork, practicum, and then student teaching. Each course has a set of assignments and journal reflections to complete based on the individual TC's experience in the field. Reviewing the assignments and journal prompts may provide more insight into how to bolster the use of Engagement strategies. In addition to student teaching, TCs in the practicum course also video record themselves. A video analysis of those videos prior to student teaching can also shed light on Engagement strategy use by both TCs and their Instructors. A prudent strategy would be to identify some useful professional development for the faculty (Bastian et al., 2018; Zeichner et al., 2024). While many of the "most" and "least" used Engagement strategies could be identified in coursework, the fact that they are not being executed in the field leads these authors to question the delivery and facilitation of said strategies in the coursework. Further training in Engagement and UDL in general may serve to increase the effectiveness of the instructors' conveyance of said strategies. One additional part of program evaluation is the use of multiple measures to ensure a more holistic view of course engagement (Feuer et al., 2013; Henry et al., 2012; Zeichner et al., 2024). Bringing student opinion surveys to the discussion, as well as reviewing certification test results, may help identify faculty and course needs. Analyzing in-house assessment information, such as artifacts used for accreditation, may also highlight areas for improvement.

Limitations and Future Research

There are limitations to the current study. In regard to sample size, although more videos were available, the included sample serves as a pilot for future research. In addition, with the VOSAIC recording software being new to the department, the accessible pool of videos was limited to only 3 cohorts. The wide variation in interpretation and execution of UDL Engagement strategies made

inter-rater reliability difficult. Discussions regarding any discrepancies between the researchers were added to procedures to ensure higher reliability than initially rendered. One possible alternative would be to view and score a smaller portion of each video. For instance, focus could be placed on the anticipatory set or a small part of the body of the lesson. Another alternative would be to focus on a smaller list of strategies. While there are a total of ten Engagement considerations in the UDL Guidelines 2.2, future research could concentrate on one of the three Engagement guidelines, reducing the number of focus considerations to four or five. Another possible solution would be to explicitly define a set of engagement strategies that fall under each consideration and that the researchers would be confident looking for in the videos. Limiting research findings solely to those predetermined strategies could possibly narrow and reduce discrepancies. The current research utilized the UDL Guidelines 2.2 as the framework for collecting video evidence regarding the Engagement strategies Teacher candidates use in the field. In the summer of 2024, CAST released their revised set of guidelines, the UDL Guidelines 3.0. This revision increased the number of Engagement considerations from ten to 13. The revision also includes changes to guideline and consideration language to address barriers caused by biases and exclusive educational structures (CAST, 2024). Future research should utilize the 3.0 guidelines and explore how the changes are exhibited by Teacher candidates in the field. Future research should explore how teacher candidates are utilizing the other principles of UDL: Representation and Action and Expression. The current research saw some overlap with these principles throughout the videos but chose to limit the data collection and discussion to the Engagement strategies only. All three UDL principles need to be executed to ensure student success to its fullest capacity. Exploring the principles independently and then together in the student teaching environment would provide Instructors with a better understanding of UDL content needs in their coursework.

Conclusion

UDL content is present in Teacher prep programs, at our TCs' fingertips, regularly taught to them in multiple ways, in multiple courses (King-Sears et al., 2023). The current study suggests, however, that TCs are not internalizing UDL engagement strategies. Hence, they are not making it a part of their everyday pedagogical practice. In Teacher preparation programs, instructors must practice what they preach. If Instructors want TCs to truly embrace the UDL engagement guidelines, the instructors must first embrace them and use them in their everyday pedagogical practice. The authors of the current study identified methods TCs are using and not using in their teaching. We offer suggested practices Instructors can utilize within their own classrooms to encourage and, hopefully, increase the use of less-frequently used engagement strategies by TCs.

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What Happened to the "Duty" To Accommodate? Recent Special Education Cuts in Ontario Under the Ford Conservative Government: A Systemic Review

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Abstract

In 2018, the Ford government took office in Ontario, Canada, and made cuts to special education. The duty to accommodate is failing when viewing the current Ontario special education cuts: this paper will highlight how cost, as a parameter under the statement of undue hardship, not only makes policy and the provision of accommodations bureaucratic but also translates to a failing policy, given that hardship is experienced by students, not the government or those in control of accommodation provision. Moreover, this research will show how insufficient this policy is. The central question of this paper is what happened to the duty to accommodate if the government is making cuts to special education, claiming a funding increase to special education is unnecessary. In 2026, the issue of special education cuts has made headlines. Furthermore, this article seeks to ask: How did this issue come to be? Who is this issue really impacting? Is this issue influenced by other issues? This article will conclude by emphasizing the reality that in relation to the exclusion of students with disabilities, history is repeating itself.

Keywords: special education, special education funding, accessible education, students with disabilities

Introduction

Ontario Education Minister Paul Calandra questions, "Does the additional funding that has been increased, the funding that we've added to the system over the last number of years, does that match with improved outcomes in special education?" (Jones, 2026, para. 9). *The Policy on Accessible Education for Students with disabilities, 2018*, was created to challenge statements like Calandra's noted above by mandating the right to education for students with disabilities. *The Policy on Accessible Education for Students with disabilities, 2018*, was also established due to the unmet needs of students with disabilities. The needs of students with disabilities continue to be unmet due to the cuts to special education that have been made since 2018 and more recently in 2026. This issue is persistent despite the existence of *The Policy* on the duty to accommodate, a statement within the Policy on Accessible Education for Students with disabilities, 2018.Viewing current media coverage of the cuts to special education in Ontario, Canada, along with the duty to accommodate in *The Policy on Accessible Education for Students with disabilities, 2018* and key authors such as Karmiris (2022), Titchkosky (2011), Titchkosky (2022), and Dolmage (2017), who will theorize the issue of special education funding cuts using the field of Disability Studies. This article will ask what happened to the *duty to accommodate* if the government is making cuts to special education funding, claiming an increase is not necessary. This article argues that current funding cuts to Special Education are policy-driven; therefore, it treats the duty to accommodate as a policy and a commitment to funding education services for students with disabilities. In doing so, this article seeks to ask what happened to the duty to accommodate if cuts to Special Education are being made. Authors such as Titchkosky (2011), Titchkosky (2022), and Dolmage (2017), whose work is more focused on post-secondary education, will support this research in illustrating the state of the current special education system. *The Policy on Accessible Education for Students with disabilities, 2018,* states

> *under the Code, education providers have a legal duty to accommodate the needs of students with disabilities who are adversely affected by a requirement, rule, or standard. Accommodation is necessary to address barriers in education that would otherwise prevent students with disabilities from having equal opportunities, access, and benefits (The Ontario Human Rights Commission, 2018, p.41).*

This article examines the duty to accommodate and the claims made in this statement and questions its application when viewed alongside the Education Minister's statement mentioned earlier. Cost as a parameter under the statement of undue hardship not only makes policy and the provision of accommodations bureaucratic but also translates to a failing policy given that the hardship experienced is by students, not the government or those in control of accommodation provision. This article will begin with a section orienting readers to the language and framings of disability used in this article along with their meanings, followed by a literature review laying out current discussions within the literature on the topic of special education and special education funding cuts. Moreover, this article provides an evaluation and overview of the research process in writing this article; this article then includes a section discussing recommendations for future policy and educational planning and implications for future research on special education funding cuts, followed by a conclusion section.

A Note on Terminologies

Although often overlooked, disability is diverse in the way it is experienced, seen, and perceived, extending beyond merely a problem or a deficit. One way that disability can be seen is as a social construct. Citing Gleeson (1999), Darcy et al. (2011) define disability as "a social construct with approaches to and concepts of disability over history, between societies within historical periods and having cultural contexts" (Darcy et al., 2011, 21). The words cited above are critical to analyze to provide an orientation for how disability is constructed in a social world that continues to evolve and become influenced by individual attitudes. It is unfortunate that these attitudes have become a foundational source and have been constructed into formal knowledge that makes up perceptions and ideas of what disability is and is not. The definition of disability provided by Darcy et al. (2011) places an emphasis on the understanding that the ways in which disability is predominantly understood are shaped by the culture or cultures in which individuals in society inhabit. The words of Darcy et al. (2011) draw attention to how defining disability is an evolving practice that has continued to evolve throughout history. Due to this reality, King (2003) serves as a reminder to always be aware of one's perceptions and conclusions that are formed. King (2003) reminds us that "you have to be careful of the stories you tell. And you have to watch out for the stories that you are told. For once a story is told, it cannot be called back. For once a story is told, it is loose in the world." (King, 2003, 10). King (2003) emphasized the definitions of disability that are deeply rooted in the medical model of disability. King (2003) served as a point of caution for organizations that implement policies into practice, claiming that such policies hold the best interests of individuals being served within the institution. This claim becomes particularly questionable when people with disabilities are the individuals that a policy serves. Throughout this paper, the terms students with disabilities and disabled students have been used. This article employed identity-first and person-first language Botha et al., 2021) to refer to the segment of the disability community addressed in this article. This was done to honour the diversity of disability, in which some individuals choose to be addressed as people with disabilities, or, as it relates to this article, students with disabilities,

using People-First Language (Botha et al., 2021) and Linton (1998). Others prefer Identity-First Language (Botha et al., 2021). Person-First Language would be used to refer to individuals as ones whose identity or personhood is separate from the disability, given the longstanding societal view that disability is merely a problem in need of a solution. On the other hand, Identity-First Language takes up disability as part of identity, and one where the individual does not feel the need to separate from it, given that disability is not a deficit. An example in this article is where the "d" in disability is used in the policy's title, which has been examined in this article. The lowercase

Literature Review

The current education system is structured in a standardized one-size-fits-all manner. The assumption is that those who are unable to function within the current education system, "students with disabilities, " have that inability as a result of their disability. Articles et al. (2024) respond by saying that "how disabled students learn frames individuals as devoid of sociocultural identities" (Articles et al., 2024, 205). Furthermore, Carella (2024) states, "Inclusion is not just inviting someone to sit at your table. It is believing they belong there." Through such a statement, one must continue to question whether the current funding cuts are in line with the claims made in the duty to accommodate. More importantly, is the education system that disabled students are being asked to function within only providing the invitation that Carella (2024) is outlining, or are measures being taken to ensure that students feel as if they belong? Moreover, Citizens often assume that policy exists solely for the best interest of citizens. This causes citizens to overlook the harms of policy. Concerning this, King (2003) reminds us that "you must be careful of the stories you tell. And you have to watch out for the stories that you are told. For once a story is told, it cannot be called back. For once a story is told it is loose in the world" (King, 2003, 10). Darcy, et al., (2011) outlines the process of "othering" of people with disabilities by defining disability as "a social construct with approaches to and concepts of disability over history, between societies within historical periods and having cultural contexts" (Darcy, et al., 2011, 21). Ontario Education Minister Calandra asks, "does the additional funding that has been increased, the funding that we've added to the system over the last number of years, does that match with improved outcomes in special education?" (Jones, 2026, para. 9). In this statement, the education minister puts into perspective that the funding increase that has been made throughout the years is no longer sufficient, given that student numbers in special education have increased. Opposite to this statement, the minister claims, "he is looking at resources allocated for special education, and he wants to look at funding to date and 'have we improved outcomes' for those students" (Rushowy et al., 2026). While many educators and support providers for children with disabilities argue that the government is making cuts to special education funding, the education minister argues that "the Progressive Conservative government has significantly increased special education funding since coming to power in 2018" (Jones, 2026, para. 7). In contrast to this questioning by the Ontario Minister of Education, *The Policy on Accessible Education for Students with disabilities, 2018* states "under the Code, education providers have a legal duty to accommodate the needs of students with disabilities who are adversely affected by a requirement, rule or standard. Accommodation is necessary to address barriers in education that would otherwise prevent students with disabilities from having equal opportunities, access and benefits" (The Ontario Human Rights Commission, 2018, p. 141).

How does the statement on the duty to accommodate hold meaning when one witnesses Calandra's statement arguing that increasing funding for special education is unnecessary? Moreover, this is taking place, centering the perspectives of those who lack knowledge of what is needed to make Special Education effective. Gospel (2009) comments on the IEP formation process

as a measure to ensure adequate facilitation of Special Education practice. Gospel (2009) notes that "the Special Education Needs Code of Practice (2001) states that both parents and children should be actively involved in the decisions that surround the child's Special educational needs" (Gospel, 2009,1). Titchkosky (2022) comments on the thought process of educational institutions in relation to the inclusion of students with disabilities. Titchkosky (2022) in a way exposes the hidden agenda behind Minister Paul Calandra's statement in saying "disability is simply an unwanted troubling problem" (Titchkosky, 2022, 1). According to *The Policy on Accessible Education for Students with disabilities (2018)*, "The Supreme Court of Canada has said, 'one must be wary of putting too low a value on accommodating the disabled. It is all too easy to cite increased cost as a reason for refusing to accord the disabled equal treatment" (The Ontario Human Rights Code, 2018, p. 85). Karmiris (2022) comments on barrier-free education. Karmiris (2022) commented on the idea of education being barrier-free and referenced Ahmed (2008), stating that "we become alienated -out of line with an affective community-when we do not experience pleasure from proximity to objects that are attributed to being good" (Ahmed, 2008, as cited in Karmiris, 2022, p. 85). Why is a funding increase for special education unnecessary? Access to education and all basic rights, such as funding, is bureaucratic. According to Titchkosky (2011):

> *Bureaucracy refers to a hierarchical and regularized form of structured procedure usually managed by an office or official of an organization. It is a rationalized form of power accomplished and enforced through procedural requirements seemingly impervious to the particularity of unique or individual desires. A bureaucratic structure is one that governs itself and others by making use of established protocols and procedures- these are usually put into text as rules and regulations implemented by an office in a supposedly predictable fashion (Titchkosky, 2011, 8).*

The Elementary Teacher's Federation of Ontario comments on the recent cuts in Special Education funding and responds to Minister of Education Paul Calandra's claim that further increases in funding are not necessary given that past increases have not achieved positive results. According to The Elementary Teacher's Federation of Ontario (2026):

> *Calling this budget 'record breaking' is meaningless when it fails to meet the needs of students, especially those with disabilities. Educators have been clear that we need adequate, stable, inflation protected funding to support all learners. This government continues to ignore these calls, choosing instead to mask real dollar cuts with political spin (Elementary Teacher's Federation of Ontario, 2026, para 1).*

To contextualize this statement, Slee (2018) explains current times in education about the education of people with disabilities. Slee (2018) notes, "inclusive education isn't dead, it just smells funny" (Slee, 2018, 1). Contextualizing Titchkosky (2011) with the issue of funding cuts, the Elementary Teachers Federation of Ontario comments, "Ontario is last among provinces in revenue generation and social program spending. Yet, the Ford government can find millions to purchase an airplane" (The Elementary Teacher's Federation of Ontario, 2026, para 2). Dolmage (2017) discusses the accommodations for students with disabilities by saying, "we witness a large industry of lawyers and HR managers, and administrators paid to determine what exactly can be gotten

away with under the rubric of "undue hardship" or "undue burden" of accommodations" (p.77). Concerning the cuts to Special Education funding in Ontario, Dolmage (2017) becomes relevant as it discusses whose funding decisions should be left. The Elementary Teacher's Federation of Ontario responds that "the government is placing critical decisions about funding, staffing, and student supports in the hands of chief executive officers who do not understand the realities of Ontario classrooms. Entrusting school board budgets to individuals with no education sector experience will make an already serious situation even worse" (The Elementary Teacher's Federation of Ontario, 2026). Parekh and Underwood (2015) comment on policy developments to highlight the importance of the provision of Special Education, or as the authors call it, inclusive education. According to Parekh and Underwood (2015), "Ontario has established its own Act dedicated to accessibility, the Accessibility for Ontarians with Disabilities Act (AODA 2005). The AODA identifies school boards as organizations bound by the Act and includes people with both visible and non-visible disabilities (e.g., learning disabilities, etc. as entitled to accommodations" (Parekh et al., 2015, 3).

Furthermore, a consultation report published in 2003 entitled *The Opportunity to Succeed: Achieving a Barrier-Free Education for Students with Disabilities* outlines education funding issues for students with disabilities in the province of Ontario. According to the report, "The Supreme Court of Canada decision in Eldridge states that, when governments provide services, they have an obligation to take positive steps to ensure that members of disadvantaged groups, such as persons with disabilities, benefit equally from these services" (The Ontario Human Rights Commission, 2003, p. 46). Furthermore, the report outlines that "barriers to education can take a variety of forms. They can be physical, technological, systemic, financial, or attitudinal. They can arise from an education provider's failure to make available a needed accommodation, or to provide one promptly" (The Ontario Human Rights Commission, 2003, p. 14). This statement further highlights the importance of funding in education and how it could be a contributor to lack of access in education. Furthermore, the report highlights that "under the Act, the Ministry of Education is responsible for ensuring that all exceptional children in Ontario have available to them appropriate special education programs and services without payment of fees" (The Ontario Human Rights Commission, 2003, p. 13). The opposite of what policy claims is shown in a CBC interview quoting the Interim Liberal Leader, who says "parents can pay privately for assessments, potentially costing more than $5,000. Board specialists review the results of those assessments before incorporating them into IEPs, and because it takes less time to review an assessment than conduct a full one, the wait times for families with private assessments can be much shorter" (Jones, 2026, para. 29). Furthermore, *The Opportunity to Succeed: Achieving a Barrier-Free Education for Students with Disabilities* states, "Under Regulation 306 to the Act, school boards are required to provide special education programs and services to exceptional students. As part of this requirement, each school board must prepare a special education plan, to be reviewed annually. School boards are also required to establish Identification, Placement and Review Committees and Special Education Appeal Boards" (The Ontario Human Rights Commission, 2003, p. 13).

Though Minister Calandra argues that "does the additional funding that has been increased, the funding that we've added to the system over the last number of years, does that match with improved outcomes in special education? So, I don't necessarily have evidence that that is, in fact, the case" (Jones, 2026), para 9. *The Opportunity to Succeed: Achieving a Barrier-Free Education for Students with Disabilities* has argued since 2002 that "school boards are required to provide special education programs and services to exceptional students"(The Ontario Human Rights Commission, 2003, p. 13). The impacts of lack of special education supports have been discussed by D. W. Livingstone (2014) who outlines that "by the end of five years of secondary school (2006-2011),

25% of students had dropped out (TDSB, 2012)" (D. W. Livingstone, 2014., p. 79). The hidden agenda behind the exclusion of students with disabilities is a result of normalcy. Karmiris (2017) cites Michalko and Titchkosky (2009), who conclude that "normalcy matters because it is understood as the legitimate way of being in the world and the only version of the good life" Michalko and Titchkosky, 2009, as cited in Karmiris, 2017, 103). The policy on Accessible Education for Students with disabilities, 2018 outlines the point of undue hardship. This measure includes the following. This measure includes the following: "the code prescribes only three considerations when assessing whether an accommodation would cause undue hardship, [they are] cost, outside sources of funding, if any, health and safety requirements, if any" (The Ontario Human Rights Code, 2018, p. 84). While outlining the limitations to this policy, the Policy on Accessible Education for Students with disabilities, 2018 defines education and its importance to the development of individuals. According to the policy,

> *education is vitally important to a person's personal, social, and academic development. Achieving one's education potential affects a person's ability to take part in the labour market, realize their full potential, live independently, and participate meaningfully in society. A positive experience in elementary and secondary school increases a person's chances of going on to post-secondary education. Having post-secondary education is becoming increasingly important to a person's ability to attain a decent standard of living. Employment and Social Development Canada projects that two-thirds of job openings from 2011-2020 will be in occupations that generally require post-secondary education (The Ontario Human Rights Code, 2018, p. 7).*

The policy further comments that School is the place where most children have their first interaction with a government institution or system. What students learn and experience in school will shape their perceptions and expectations of all other government systems. If students get the right start, they will learn to respect and support one another. They will feel included and see other government systems as supports, not barriers (The Ontario Human Rights Code, 2018, p. 7).

One might ask, what happens if schools place barriers and the enactment of policy goes against what is stated above? To this, the Policy on Accessible Education for Students with disabilities responds that, "getting the wrong start in education can predispose children to think government systems and social services do not serve their interests, or even that they are designed specifically to entrench power and privilege, and maintain the status quo. This can lead to broader mistrust, suspicion, and exclusion from society" (The Ontario Human Rights Code, 2018, p. 7). In closing this section, Whitely et al. (2020) state "in a Canadian context, every province and territory includes policies in favor of inclusive education but in reality, the ways and the degree to which inclusive education is enacted and experienced by students, families, and educators vary widely both between and within jurisdictions" (Whitely et al., 2020, p. 1). This statement illustrates the agenda behind Minister Calandra's statement about a funding increase for Special Education being unnecessary. Furthermore, Whitely et al. (2020) rationalize the bureaucracy behind the provision of funding for special education and special education services: "how media discourse frames topics in areas such as education or disabilities can both reflect and influence public understanding, beliefs and actions. With respect to education funding, public perception is particularly important to understand, given how the availability and allocation of funding for inclusive education is influenced by various communities" (Whitely et al., 2020, p. 1). This section has provided an overview of

literature in the fields of Education, Educational Policy, Disability Studies, and Policy Studies. To substitute for the absence of sufficient literature on funding cuts to Special Education, this section has also utilized policy statements from policies that outline the right to education for students with disabilities. These policies were also used to write a comparative analysis of current lived situations of educators and students with disabilities to showcase the unfortunate reality that policy is not always adequately implemented into institutional practices. Furthermore, this comparative analysis was written to show that those working within education institutions and within the governance of education institutions. This section also illustrated that education institutions and government officials alike favor upholding power and bureaucracy Dolmage (2017), Titchkosky (2011), and Titchkosky (2022). Thus, one must critically question: Where has the duty to accommodate gone if students with disabilities are being taken out of the classroom, given that their needs are not accommodated?

Analysis of Literature

Although locating credible sources and literature to formulate this research and build the theoretical analysis and begin the conversation around the issue of funding cuts in special education was challenging, the literature analyzed helped to build a strong foundation and understanding of the issue at hand. This section analyzes each article used to formulate the theoretical framework of this article. In this discussion, this section also outlines the purpose of each article and its contributions and relevance to this research. To further extend the inquiry beyond the central question taken up in this research, which sought to find out where the duty to accommodate has gone if students with disabilities are being taken out of the classroom given that their needs are not accommodated, this section will delve deeper into the questioning process. To delve deeper into the questioning process, the literature in this article responds to the question of what the issue is. How did this issue come to be? Who is this issue really impacting? Is this issue influenced by other issues? And who is behind this issue? The literature review section of this article began with a CBC News article; although it was not considered scholarly, it was useful in illustrating that the issue exists. This article began to respond to what the issue is at hand and who is behind this issue. In response to who is behind this issue, the article highlights that Education Minister Paul Calandra is found asking, "Does the additional funding that has been increased, the funding that we've added to the system over the last number of years, does that match with improved outcomes in special education?" (Jones, 2026, para. 9). Solely analyzing this statement in identifying the issue was crucial. Without questioning and further research, one can see that the issue at hand is funding for special education and the proposal to decrease funding because an increase is deemed unnecessary. Regarding responding to who is behind this issue, it can be seen that the government is behind this issue, as the CBC article highlights the words of the Minister of Education in the province of Ontario.

The minister's statement also responds to who is impacting this issue. Although not clear, if employing a Disability Studies lens, that connects the practice of "Special Education" as a practice assigned solely to students with disabilities. Moreover, Artiles et al. (2024) respond, "how disabled students learn frames individuals as devoid of sociocultural identities" (Artiles et al., 2024, p. 205). The use of Artiles et al. (2024) and this particular statement is to illustrate the repetition of history and how the issue of Special Education funding cuts is not a new issue but one that is on the rise. More importantly, it draws attention to the reality that the root cause and the driving force of cuts to Special Education funding is connected to the social construction of disability (Darcy et al., 2011). It communicates that we continue to be consumed by a neo-liberal state that upholds power and influences the perception that "how disabled students learn frames individuals as devoid of

sociocultural identities" (Artiles et al., 2024, p. 205). Moreover, Carella (2024) laid the foundation in identifying the issue when outlining, "Inclusion is not just inviting someone to sit at your table. It is believing they belong there" (Carella, 2024, n.p.). This statement holds multiple meanings, one of which is that it is not about the existence of policy or the act of developing policy but about how policy is implemented in practice and what impact policy has. Carella (2024) also speaks out about the practice of Special Education and begins the conversation that, though the provision of special education enhances opportunities for learners with disabilities, especially in recent times, it fails to be adequate because the staff-to-student ratio is insufficient. King (2003) highlighted the importance of critically analyzing policy statements before concluding that policy has positive intentions. About this conclusion, King (2003) reminds us that "for once a story is told it is loose in the world" (King, 2003, p.10). Regarding the portrayal of policy's purpose and what Adichie (2009) refers to as "the danger of a single story" (Adichie, 2009, p. 1). Furthermore, Adichie (2009) highlighted the influence stories can have on constructing one's understanding of the world and people. Through this work, policies are situated as stories told, and ones portraying a specific message; once told, these stories are "loose in the world" (King, 2003, p.10). This work cautions that once a story is "loose in the world" (King, 2003, p.10). Stories being loose in the world in relation to policy is when policy is passed and enacted, and its impact is experienced by those it is meant to impact. One of the authors whose purpose in this article is open to questioning is Dolmage (2017). This questioning is caused by the fact that Dolmage (2017)researched ableism in higher education, whereas this article discussed primary and secondary education, where special education is employed as a practice of educating people with disabilities. When justifying the use of Dolmage (2017), this author highlighted that academic ableism exists at all levels of education, including primary and secondary education. Another author whose use in this article would be questioned and whose role may be deemed irrelevant is Titchkosky (2011), given that this author has taken up issues existing in higher education. Although Titchkosky (2011) focused on issues impacting students with disabilities in higher education, this work was still useful for this article given that, among other issues, Titchkosky (2011) discussed bureaucracy embedded in accommodations that are also necessary and should be provided for students within primary and secondary education. Moreover, Titchkosky (2011) is relevant to this research given that one of the root causes of funding cuts to special education is the bureaucracy that exists when funding allocations are made. Additionally, the post-secondary accommodations that Titchkosky (2011) discusses are policy-guided procedures, and primary and secondary school accommodations are no different.

Future Policy and Educational Planning

One of the distinguishing factors in the issue of cuts to Special Education funding in comparison to other issues in the field of Education or even Disability Studies is that, with cuts to Special Education, especially ones taking place recently in the province of Ontario, it is not merely an issue of lack of planning but, through the education minister's statement highlighted throughout this paper, implementation of written policy is inadequate and, more importantly, the government agenda is not aligning with the written statement. This argument is made through careful examination of the issue and also the literature that has been utilized in this article, which has shown that cuts to Special Education have been an issue that did not only come into existence in May of 2026 but one that has existed for many years and, more importantly, Special Education funding cuts as an attempt to exclude disabled students from schooling have been persistent throughout disability history. Moreover, the recent media coverage sheds light on how the cuts translate to the reality that policy statements written are not always thoroughly implemented in practice. Authors such as

Parekh (2020), Dolmage (2017), Titchkosky (2011), and Titchkosky (2022) have done the work of exposing policies and practices that have emerged from current policies. The three authors could be analyzed to provide recommendations for future policy planning.

The first issue that contributes to the lack of sufficient funding in special education is one that has been expressed by the Elementary Teacher's Federation of Ontario, which outlines that funding is distributed to other areas and services, leaving special education as a low priority and underfunded. Therefore, the existence of policy is not enough without sufficient implementation into practice and, more importantly, reinforcement. Given that it has been made evident that sufficient funding exists, it is recommended that a closer look is taken at funding allocation and equitable distribution in government funding, making special education a priority on the agenda instead of taking steps to eliminate it. One of the issues raised earlier in this article by the Elementary Teacher's Federation of Ontario is that the management of funding is placed in the hands of those who do not have knowledge about funding and, in this case, the amount of funding needed to cover special education needs. Moreover, as outlined by the Elementary Teacher's Federation of Ontario, special education funding covers numerous aspects related to educating students with disabilities. Due to the standardized nature of the Ontario Education system, several things must be put in place to facilitate access to education for students with disabilities. In relation to primary and secondary education, students with disabilities need to obtain documentation to support the legitimacy of their accommodation requests. In primary and secondary education, this looks like conducting an Individual Plan Review Committee Meeting (IPRC), which consists of special education teachers, school psychologists, school social workers, and, to some extent, parents of the students. In these meetings, major decisions are made regarding student progress, learning goals, strengths, and areas of need, also referred to as "weaknesses." According to *The Opportunity to Succeed (2002,* "Under Regulation 306 to the Act, school boards are required to provide special education programs and services to exceptional students. As part of this requirement, each school board must prepare a special education plan to be reviewed annually. School boards are also required to establish Identification, Placement, and Review Committees and Special Education Appeal Boards" (The Ontario Human Rights Commission, 2002, p. 13).

School Psychologists in attendance at the IPRC meetings perform tests with the students to evaluate student capacity in accordance with classroom expectations. These tests allow the school psychologists to provide insight into the formation of an Individual Education Plan (IEP), which will include goals for the student, strengths and weaknesses, and supports that the student needs within the classroom. This series of tests and the formation of the IEP have a cost associated with them, which, according to the Ontario Human Rights Code, should be covered by the school board. Students, both in primary and secondary education, may also require the support of an educational assistant to facilitate one-on-one support with learning and daily activities. This type of support is also under the umbrella of special education, where funding needs to be adequately allocated to ensure adequate staffing is available and paid adequately for the work being done. Some students also require adaptive technology and equipment to facilitate accessible learning within the classroom. This particular area under the umbrella of special education is a broken rule due to the funding cuts when taking a closer look at the Policy on Accessible Education for Students with Disabilities, 2018, the Ontario Human Rights Code, 1990, and the Ontarians with Disabilities Act, 2005, given that all these policies outline the obligations assigned to schools and school boards to fund the provision of adaptive technology and equipment needed for the student to thrive within the classroom setting. Finally, returning to an earlier comment in this section and also mentioned in the article, a major issue facing the special education sector is that funding allocation is managed by those who lack

knowledge of how to adequately distribute funding and, more importantly, those currently in control of funding allocation lack a deeper understanding of the importance and purpose of special education. Therefore, it is recommended that committees be formed to discuss funding allocation in special education. These committees must consist of disability scholars and practitioners, educators with a background in educating students with disabilities, and parents of students with disabilities should also be included in these committees given their insider perspective. As stated by the Elementary Teacher's Federation of Ontario (2026), funding shortages within schools and school boards occur; parents must pay out of pocket to ensure that supports are in place for their disabled child. All research requires further inquiry and is ongoing. The area of Special Education and Special Education Funding is no different, as several scholars in this article have begun to argue that it is crucial to do so. The next section in this article discusses implications for future research. These implications were based on patterns of existing literature and where the gaps are, conclusions made by authors that were used throughout this article, shortcomings of the current education system and existing policy, and the absence of student and educator voices and the voices of other allies, which in turn would yield that it is necessary for those voices to be brought to the forefront and should be the perspectives used to enact change and advocate for policy change and development of policy that has yet to exist.

Implications for Future Research

Though the government's lack of attention and cuts to special education funding and services is not a new issue, locating scholarly literature that discussed the funding cuts in the province of Ontario to support this research in shedding light on the current issue that received media attention was extremely challenging. To compensate for the absence of recent literature in this area, this research turned to literature to illustrate the prolonged existence of the issue of lack of funding or continuous funding cuts to special education in Ontario. When this research began, the original plan was to locate literature discussing current cuts to special education under the Ford provincial government in Ontario, which has now served two terms. The results of conducting such searches resulted in locating newspaper articles and news interviews that were not of a scholarly nature. This led to the decision to look at literature on cuts to special education funding without specifying that it must be related to the recent cuts that have received media attention in May 2026. The result was more literature; although still limited, it laid the groundwork for what conversations are taking place in relevant fields on the issue of special education and special education funding. The literature existed within fields of Disability Studies, education, and Educational Policy; in addition to policy documents and reports, two news articles were also used to contextualize the issue of provincial funding cuts to special education. Moreover, during the research process, it was concluded that it was crucial to also include literature that laid the foundation for how disability and people with disabilities are perceived in society, as this does contribute to the current issue at hand in this research, which looked into the funding cuts to Special Education in Ontario. The next section in this article will provide recommendations for future policy and educational planning, which include practices to be included to enhance the provision of Special Education, which includes but is not limited to an increase in funding to align with the increase in the student population requiring Special Education and be consistent with the statement on the duty to accommodate and abide by its guidelines to have those in education and governance of education view accommodating students with disabilities as necessary, and this duty must not be hindered by a lack of funding and resources to ensure a barrier-free education for students with disabilities.

While this research was critical to complete, it was also challenging to compose. As stated earlier, the issue of Special Education funding cuts is not a new issue but rather persistent, especially in the province of Ontario, more significantly since the election and re-election of the Ford Conservatives, who were re-elected in 2025 and were first elected in 2018. Despite the reality that the issue of provincial cuts to Special Education funding has received media attention and official coalitions have protested the issue, it continues to fall short when it comes to scholarly literature. Though Special Education overall has been widely researched, and a large body of literature exists in this area, more research is needed to discuss the progression of this issue in a local context. With this observation in mind, more research on the area of funding cuts and shortages in Special Education is needed to support enhancing conversations about what is happening in Special Education regarding funding. One direction that future research can take is including voices of educators working in Special Education, Educational Assistants, parents, and even students with disabilities who could provide great insight into what needs they have and what needs are left unmet by the current system. Moreover, researchers exploring this topic should discuss media accounts and coverage of the Special Education funding cuts in Ontario to illustrate real-world examples of these issues and their impact, as this was a major gap in the literature and could support citing literature that is considered credible and scholarly. Moreover, given that studies include media accounts, this would qualify these discussions as being scholarly, given that they are taken up alongside other relevant research on this topic.

Current patterns in the literature placed much greater emphasis on Special Education as a field and the development and history of Special Education; however, when it came to locating literature that delved deeper into what occurs within Special Education classrooms, student needs, and the impacts of funding cuts on students and educators within those classrooms, a major gap was found. Analyzing literature that discussed the purpose of Special Education, its history, criteria for placement in Special Education classrooms, the different classifications for students in Special Education classrooms, and the definition of disability that is written using predominantly the medical model was important and served a critical role, especially in formulating the understanding that current practices are influenced by understandings of what disability is and how disability should be "dealt with" was useful. This was not only crucial for tracing disability education history but also to conclude that when seeking an explanation for the persistence of exclusion of people with disabilities within systems in society, including the education system, which this research has focused on, a major cause being Special Education funding cuts, one must be cognizant before believing policy, government, and organizations implementing and enacting policies merely exist for the best interests of students with disabilities. Moreover, the overview provided on the history of Special Education, the purpose of it, and the literature discussing placement in and testing for Special Education has emphasized that history repeats itself even in current modern times, where there are noticeable developments in how disability is perceived and interpreted; this is argued given that, as stated earlier in this research, cuts to special education are not a new issue.

Conclusion

As stated previously, Education Minister Calandra questions the increase in special education funding, deeming it unnecessary. Through literature and the use of policy statements existing in major policies such as The Policy on Accessible Education for Students with disabilities, 2018, The Ontario Human Rights Code, and The Accessibility for Ontarians with Disabilities Act, 2005, this article has responded to the question of where the duty to accommodate has gone if students with disabilities are being taken out of the classroom, given that their needs are not accommodated.

Literature utilized throughout this article has shown that the "duty to accommodate" is clearly bureaucratic and remains unfulfilled. More importantly, this article has shown the unfortunate reality that those within education or even governing funding provision do not fulfill the duty to accommodate outlined by policy; those individuals are not held accountable to address the shortcomings of institutional practices that are clearly harming students, educators, those supporting students in Special Education classrooms, and even parents and caregivers. It is important to note that the issue at hand is not the absence of policy, but the implementation of it into institutional practices. Governments continue to claim that policies are developed in the best interests of "all" citizens, and yet this claim proves opposite when it comes to students with disabilities and how this population has been treated not only in recent years but throughout history.

The purpose of policy's existence becomes questionable when not only implemented into practice or when policy is disregarded, but when the impacts of specific sections of policy are closely analyzed. One example of a harmful policy section is on undue hardship, in which it is stated that the duty to accommodate is conditional. As stated earlier, The Policy on Accessible Education for Students with disabilities, 2018 outlines that academic institutions and those working within have a duty to accommodate to the point of undue hardship. As outlined in the literature review section of this article, the point of undue hardship encompasses parameters. This article focuses on the parameter of cost, given it discusses funding cuts. It is Undue hardship and current practices; one must be critical in examining adequate implementation of policies and institutions that can be considered as entities of policy regarding the inclusion of students with disabilities. In closing, to move forward and ensure change is made and the issue is at hand is addressed, " you have to be careful of the stories you tell. And you have to watch out for the stories that you are told. For once a story is told, it cannot be called back. For once a story is told, it is loose in the world" (King, 2003, p.10). The goal is to develop policy that has a positive impact from the start. If policy is designed to be abided by and implemented into practice, then the discussion of this article has clearly shown that the duty to accommodate is not adequately implemented into practice, given that despite written policy statements that have for many years existed to serve the purpose of protecting the rights to education among other rights of people with disabilities, individuals with disabilities continue to face exclusion; therefore, one must be vigilant of "the danger of a single story" (Adichie, 2009, p. 1) when viewing disability through the claim of policy developers and those in power. Examining policy against practices and how policy statements are enacted within institutions, one must be critical when concluding policy's intent. Pertaining to the issue of special education funding cuts in Ontario, Canada, the impact of the "Duty to Accommodate" is not seen, given that the policy statement is not implemented when providing special education because politicians deem a funding increase to be unnecessary; therefore, the commitment to funding provision is disregarded. As shown in this research, policy has a hidden agenda by deeming certain things not a priority.

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Examining Academic Staff's Organizational Commitment in Public Universities in Oromia Region, Ethiopia: A Multidimensional Analysis

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Abstract

This study examined organizational commitment among academic staff in public universities in Oromia Region, Ethiopia, focusing on affective, continuance, and normative dimensions and their interrelationships. Grounded in Meyer and Allen's three-component model, the study used a quantitative, descriptive correlational design. Through multi-stage sampling, 358 academic staff completed the validated Allen and Meyer Commitment Scale. Data were analyzed using descriptive statistics, Pearson correlation, and profile-oriented interpretation. Results showed a moderate overall level of commitment. Affective commitment ranked highest, followed by normative and continuance. Affective commitment correlated most strongly with the overall composite, followed by normative and continuance. The dimensions were interrelated but distinguishable: affective and normative commitment showed a moderate correlation, while affective and continuance commitment showed a weak correlation. The study concludes that affective commitment is the most prominent dimension, with normative commitment also playing a meaningful role, while continuance commitment is least salient. Because the composite score derives from the same items as the subscales, correlational patterns reflect the construct's internal structure rather than independent prediction. Administrators should prioritize affective-enhancing interventions such as recognition programs, participatory governance, and career development, while reducing reliance on continuance-based retention strategies.

Keywords: affective commitment, continuance commitment, normative commitment, academic staff

Introduction

Employee commitment has long been recognized as a cornerstone of organizational effectiveness across diverse sectors (Nishanthi & Kailasapathy, 2018). Empirical evidence consistently demonstrates that committed employees exhibit enhanced job performance, reduced turnover intentions, and increased organizational citizenship behaviors (Ahmed et al., 2022; Williams & Johnson, 2023). Such employees willingly invest their time and energy toward achieving institutional objectives, rendering them an organization's most valuable strategic asset (Martinez et al., 2024). Understanding the psychological mechanisms underlying employee commitment has therefore become a central concern for contemporary organizational research. Although multiple definitions have emerged across decades of research, a unifying theme pervades the literature: organizational commitment fundamentally refers to the emotional bond or psychological attachment between employees and their organizations (Allen & Meyer, 1990). Contemporary scholarship conceptualizes this bond through three distinct yet interrelated components: affective commitment

(emotional attachment and belief in organizational goals), normative commitment (willingness to exert effort driven by moral obligation), and continuance commitment (desire to remain based on perceived costs of leaving (Meyer & Allen, 1997; Singh et al., 2024).

Extending this conceptualization to public higher education, academic staff organizational commitment refers to the psychological attachment and loyalty that faculty members develop toward their universities, manifested in their willingness to exert effort, pride in institutional affiliation, and intention to remain (Allen & Meyer, 1990; Bacha & Kosa, 2024; Tegegne & Wondimu, 2024). Committed faculty go beyond minimum requirements, foster student success and innovation, and sustain institutional reputation through greater engagement in teaching, research, and service (Younis et al., 2024). Conversely, low organizational commitment among academic staff is associated with reduced productivity, diminished collegiality, and faculty attrition, outcomes that undermine institutional stability and educational quality (Tegegne & Wondimu, 2024).

The urgency of addressing faculty commitment in Ethiopian public universities is grounded in concrete and documented institutional challenges. Faculty members face economic instability, with monthly salaries ranging from approximately 8,474 birr for a graduate assistant to around 39 thousands birr per month for a full professor, compensation that is widely reported to be insufficient to cover basic living expenses and that contributes to significant job dissatisfaction and adverse impacts on instructional efficiency (Assefa, 2025). This financial strain is compounded by high and rising living costs, leaving many faculty members struggling to meet basic physiological and safety needs (Assefa, 2025). Simultaneously, faculty operate within a system characterized by constrained institutional autonomy and political interference, where centralized governance and external political influence limit universities' ability to make independent decisions, stifling innovation and responsiveness to academic needs (Aboye & Metcalfe, 2021; Asmamaw, 2026). This environment of limited academic and administrative freedom creates an architecture of unresponsiveness that neutralizes intellectual agency and undermines the principles of academic freedom (Asmamaw, 2026).

Turnover intention among academic staff remains a persistent and systemic concern, with studies documenting significantly increased intentions to leave among faculty across multiple Ethiopian public universities, including the University of Gondar (Dachew et al., 2016), Mettu University (Yarimbab & Mezgebu, 2019), Madda Walabu University, and first-generation universities such as Jimma, Hawassa, and Gondar (Kebede, 2022). Institutional data further reveal alarming attrition patterns, with one college at Addis Ababa University recording a 92.8% turnover rate over twenty years and 172% in the most recent five-year period (Hailu et al., 2013). These conditions directly undermine the capacity of universities to retain qualified academic staff, maintain educational quality, and fulfill their institutional missions. Despite decades of theoretical and empirical advancement in understanding affective, normative, and continuance commitment in Western and industrialized contexts (Allen & Meyer, 1990; Williams & Johnson, 2023), parallel evidence remains disproportionately limited across developing regions, particularly in African public universities, where systematic multidimensional assessments addressing all three dimensions simultaneously remain exceptionally scarce (Bacha & Kosa, 2024; Nkosi & Dlamini, 2025). In Ethiopia, although some research has examined employee commitment within organizations (Kassaw & Golga, 2019; Tegegne & Wondimu, 2024), empirical evidence regarding academic staff organizational commitment across all three dimensions in public higher education remains limited and fragmented. Prior efforts to enhance work performance in Ethiopian higher education institutions have largely focused on structural, resource-based, or administrative reforms, with limited systematic attention directed toward understanding academic staff's psychological

attachment to their institutions (Tegegne & Wondimu, 2024; Worku & Demissie, 2025). Without knowing the current commitment profile of academic staff-whether they remain due to emotional attachment (affective), moral obligation (normative), or perceived costs of leaving (continuance) university leaders cannot effectively reduce faculty turnover, enhance job performance, or foster a positive work culture (Bacha & Kosa, 2024; Tadesse & Wondimu, 2025).

This study is justified on theoretical, empirical, contextual, and practical grounds. Theoretically, Meyer and Allen's (1991, 1997) three-component model has been predominantly tested in Western corporate settings (Allen & Meyer, 1996; Meyer et al., 1993), and its applicability to higher education in sub-Saharan Africa, particularly within Ethiopian public universities, remains underexplored. This study contributes to the theoretical literature by examining how affective, continuance, and normative commitment operate among academic staff in Oromia's public universities. Empirically, while extensive research has demonstrated that organizational commitment predicts positive outcomes such as reduced turnover, enhanced job performance, and increased organizational citizenship behavior (Meyer et al., 2002; Williams & Johnson, 2023), limited empirical evidence exists regarding the actual levels of each commitment dimension among academic staff in Ethiopian higher education institutions (Tegegne & Wondimu, 2024). Most prior studies have focused on private sector employees or non-Ethiopian contexts, leaving a critical gap in understanding the commitment profiles of faculty members in public universities. Contextually, public universities in Ethiopia face persistent challenges related to faculty turnover, low morale, and perceived decline in educational quality (Tegegne & Wondimu, 2024; Worku & Demissie, 2025). Despite various structural and administrative reforms, limited systematic attention has been directed toward understanding the psychological attachment of academic staff to their institutions. Practically, findings from this study will provide actionable evidence for university administrators, policymakers, and human resource practitioners. By identifying whether academic staff demonstrate stronger affective, normative, or continuance commitment, institutions can tailor their retention strategies, recognition programs, and professional development initiatives accordingly. For instance, low affective commitment may signal a need for improved organizational culture and leadership practices, whereas high continuance commitment with low affective commitment may indicate that staff remain only out of economic necessity, posing risks for long-term institutional stability (Meyer et al., 2002; Tegegne & Wondimu, 2024). Thus, this study may serve as a diagnostic tool to inform evidence-based human resource policies aimed at strengthening faculty commitment and, ultimately, improving higher education outcomes in the Oromia Region. Therefore, the core problem prompting this study is the absence of comprehensive baseline empirical data on the multidimensional nature of academic staff organizational commitment in public universities in Oromia Region, Ethiopia. This study seeks to fill this gap by investigating each dimension of academic staff organizational commitment and their interrelationships, thereby providing empirical evidence to inform institutional policies and leadership practices for strengthening faculty commitment and improving higher education outcomes in the region. The following research questions guided this study:

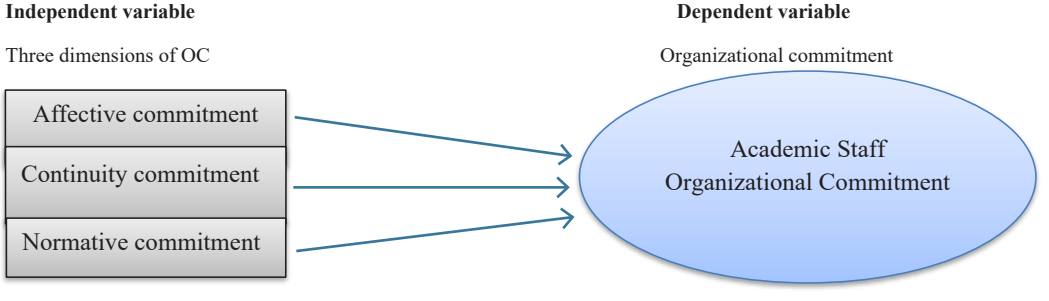
RQ1. What is the level of affective, continuance, and normative commitment among academic staff in public universities in Oromia Region, Ethiopia?
RQ2. What is the overall level of organizational commitment among academic staff in these universities?
RQ3. How are the three dimensions of organizational commitment interrelating, and what does this pattern suggest about the nature of overall commitment in this context?

Theoretical Framework

This study is grounded in Meyer and Allen's (1991, 1997) three-component model of organizational commitment, one of the most empirically validated frameworks for understanding employee-organization relationships (Allen & Meyer, 1996; Meyer et al., 1993). The model conceptualizes organizational commitment as a multidimensional psychological state comprising three distinct yet interrelated components: affective commitment (emotional attachment to the organization), continuance commitment (perceived costs of leaving), and normative commitment (felt obligation to remain; Meyer & Allen, 1991). Affective commitment reflects staying because one wants to, continuance commitment. After all, one needs to, and normative commitment because one ought to (Meyer et al., 1993; Meyer & Allen, 1997). Empirical evidence indicates that affective and normative commitment are consistently correlated with positive work outcomes such as enhanced job performance, reduced turnover, and organizational citizenship behavior, whereas continuance commitment shows weaker or mixed effects (Meyer et al., 2002; Williams & Johnson, 2023). Within higher education, academic staff commitment across all three dimensions is a critical determinant of faculty retention, teaching quality, research productivity, and institutional effectiveness (Tegegne & Wondimu, 2024; Younis et al., 2024). Thus, Meyer and Allen's (1991, 1997) model provides a robust theoretical lens for assessing the multidimensional nature of academic staff organizational commitment and the interrelationships among its dimensions.

The conceptual framework for this study was adapted from Meyer and Allen's (1991, 1997) three-component model of organizational commitment. The framework positions affective commitment, continuance commitment, and normative commitment as three interrelated dimensions that collectively constitute overall organizational commitment. The study examines the level of each dimension, the overall composite level, and the intercorrelations among dimensions.

Figure 1. *Conceptual framework of the study (Adapted from Meyer & Allen, 1997)*



Methods

This study adopted the positivist research philosophy, which emphasizes objective measurement, observable phenomena, and the examination of relationships between variables through statistical analysis (Creswell & Creswell, 2018). The positivist paradigm was deemed appropriate as it emphasizes objective measurement and statistical analysis while acknowledging that organizational commitment, as a psychological construct, is measured through self-reported perceptions (Saunders et al., 2019). Given that this study aimed to measure existing levels of organizational commitment dimensions and quantify their interrelationships, a positivist epistemological stance provided the most suitable foundation. A quantitative, non-experimental, descriptive correlational research design was employed for this study. This design was selected for two primary reasons: it

enabled systematic description of commitment levels across the three dimensions, and it permitted examination of the intercorrelations among dimensions (Creswell & Creswell, 2018). The descriptive component facilitated systematic assessment of commitment levels and computation of the overall composite score, while the correlational component permitted bivariate analyses of relationships among dimensions. Data were collected at a single point in time (cross-sectional) with no variable manipulation (non-experimental), making this design appropriate for establishing baseline empirical evidence in an under-researched context (Creswell & Creswell, 2018). The quantitative approach enables objective measurement using validated instruments and is consistent with prior studies operationalizing Meyer and Allen's (1991) three-component model (Allen & Meyer, 1996; Meyer et al., 1993). Because the design is cross-sectional and correlational, the findings describe associations among variables and do not establish causation or direction of effect.

Data Collection and Instruments

Primary data were obtained directly from active academic staff using a structured, self-administered questionnaire. Secondary data were drawn from reputable peer-reviewed journals, academic books, institutional reports, and official documents from the Ministry of Education and individual universities to contextualize findings and support the study. The target population comprised all 12,495 active academic staff across the 13 public universities in Oromia Region, serving as the sampling frame (Kothari, 2004). The sample size was determined using Kothari's (2004) formula, employing a 95% confidence level and a 5% margin of error. The calculation was performed as follows:

$$n = \frac{\mathrm{z}^2.\,\mathrm{p}.\,\mathrm{q}.\,\mathrm{N}}{e^2(\mathrm{N}-1) + z^2.\,\mathrm{p}.\,\mathrm{q}}$$

Where N = 12,495, e = 0.05, z = 1.96, p = 0.5, q = 0.5.

$$n = \frac{\mathrm{z}^2.\mathrm{p.q.N}}{e^2(\mathrm{N}-1)+z^2.\mathrm{p.q}}$$

$$n = \frac{1.96^2\mathrm{x}(0.5)\mathrm{x}(0.5)\mathrm{x}\ 12{,}495}{0.05^2(12{,}494) + 1.96^2\mathrm{x}(0.5)\mathrm{x}(0.5)}$$

$$\mathrm{n}= \underline{373}$$

The calculation yielded a sample size of 373 active academic staff members.

A three-stage multi-stage sampling approach was employed due to geographical dispersion and logistical constraints. Stage 1 involved simple random selection of five public universities from the 13 in Oromia Region: Ambo University, Adama Science and Technology University, Arsi University, Dambi Dollo University, and Wollega University. This represented approximately 38% of the population, consistent with conventions recommending 30% to 50% sampling for heterogeneous, geographically dispersed populations (Sekaran & Bougie, 2016). The selected universities represent diversity in institutional age, size, location, and academic focus, enhancing external validity. Stage 2 employed stratified random sampling at the college level. Strata were formed based on academic colleges, with the number of colleges per university ranging from 4 to 5, including Social Sciences and Humanities, Business and Economics, Natural and Computational Sciences, Engineering and

Technology, Health Sciences, and Law. Participants were proportionally allocated to each college based on staff size relative to the total university academic staff. This proportional allocation ensured that colleges with larger staff contributed more respondents, while smaller colleges were adequately represented. The sample size per college ranged from 4 to 41, with total sample sizes per university as follows: Ambo (n = 86), Arsi (n = 83), Adama (n = 76), Dambi Dollo (n = 74), and Wollega (n = 57). Stage 3 involved random participant selection within each college via a lottery system, wherein each staff member received a unique number, and draws continued until the stratum quota was met. This systematic random procedure minimized selection bias and ensured equal selection probability for all academic staff. While the sample (n = 373) was drawn from five of the 13 public universities in Oromia Region, the findings are generalizable primarily to the sampled universities. The study did not include the remaining eight universities; therefore, caution should be exercised when generalizing to the broader population of all 13 public universities. However, the use of stratified random sampling, proportional allocation, and the diversity of the sampled universities in terms of age, size, location, and academic focus enhance internal validity and support cautious generalization to similar universities within the region. Future research should include all universities to establish broader generalizability.

Data were collected using a structured questionnaire with two sections: demographic information and staff organizational commitment. Organizational commitment was measured using Allen and Meyer's (1990) three-component model, comprising 18 items rated on a five-point Likert scale ranging from 1 = Strongly Disagree to 5 = Strongly Agree, measuring affective, continuance, and normative commitment (self-rated). Subsequently, scores of two negatively keyed items under the continuance commitment dimension were reversed as per the scale manual for scoring. To minimize common method bias, Harman's single-factor test was conducted, and results indicated that no single factor accounted for the majority of variance (Podsakoff et al., 2003). The overall composite organizational commitment score was computed as the mean of all 18 items across the three subscales (affective, continuance, and normative). This approach is consistent with the multidimensional conceptualization of organizational commitment, where the overall construct is represented by the totality of its dimensions (Meyer & Allen, 1997). However, because the composite score is mathematically derived from the same items that constitute the three subscales, the composite is a linear function of the three dimensions:

$$\text{Overall Commitment} = \frac{AC+CC+NC}{3}$$

This confirms that the composite score was indeed computed as the unweighted mean of the three subscale means which, given equal numbers of items per subscale (6 each), is mathematically identical to the mean of all 18 items. Consequently, any analysis that treats the composite as a dependent variable and the three dimensions as independent predictors would constitute a part-whole analysis, not a test of independent prediction. For this reason, the present study does not employ regression of the composite on its constituent dimensions. Instead, the analysis focuses on descriptive statistics for each dimension and the composite and bivariate correlations among dimensions and with the composite.

Validity and Reliability

To ensure the validity of the instruments, particular attention was given to content validity, the extent to which a measurement tool adequately reflects the full scope of the concept it intends to measure. Content validity was carefully established through reviews by three experts in Educational

Planning and Management. Construct validity was further assessed through confirmatory factor analysis, which confirmed the three-factor structure (CFI = .91, RMSEA = .06, SRMR = .05), supporting the distinctiveness of the three commitment dimensions. Regarding reliability, a pilot test was conducted at Salale University with 34 academic staff members to assess the consistency and stability of the survey questionnaire. Internal consistency was evaluated using Cronbach's alpha coefficient, with a threshold of .70 considered acceptable (Hair et al., 2019). The reliability results for both the pilot study and the full study sample are presented in Table 1.

Table 1. *Reliability results*

Scale	Items	Pilot α (n = 34)	Full Sample α (N = 358)
Affective Commitment	6	0.85	0.89
Continuance Commitment	6	0.79	0.82
Normative Commitment	6	0.82	0.86
Composite of Commitment	18	0.91	0.93

As shown in Table 1, the full-sample reliability coefficients were consistently acceptable to excellent, with affective commitment (α = .89), continuance commitment (α = .82), normative commitment (α = .86), and the overall composite (α = .93). These values confirm the internal consistency of the instrument as actually used in this study and support the psychometric soundness of the measures.

Methods of Data Analysis

Data were analyzed using IBM SPSS Statistics (Version 26) in accordance with the three research questions. For Research Question 1, descriptive statistics (means and standard deviations) were computed to determine the levels of affective, continuance, and normative commitment. For Research Question 2, the same descriptive statistics were used to establish the overall composite commitment score. For Research Question 3, Pearson product-moment correlation was employed to examine the interrelationships among the three dimensions and between each dimension and the composite. All correlations were tested at the .05 significance level (two-tailed). Because the composite was computed as the unweighted mean of the three subscales, dimension–composite correlations reflect the construct's internal structure rather than independent prediction; thus, no regression analysis was performed

Ethical Considerations

Ethical approval was obtained from Ambo University Research Ethics Committee. Participation was voluntary, and informed consent was secured from all respondents. Anonymity and confidentiality were maintained throughout, and data were used solely for research purposes.

Results and Discussions

Of the 373 distributed questionnaires, 15 (4.02%) were excluded due to incompleteness, yielding a final sample of 358 usable cases (response rate = 95.98%). Five demographic characteristics of respondents: sex, age, qualification, academic rank, and current work experience were taken into consideration as background characteristics for the quantitative respondents in this study, and each is presented and discussed.

Table 2. *Personal demographic characteristics (gender and age) of respondents (N = 358)*

Variable	Category	f	%
Gender	Male	287	80.2
	Female	71	19.8
Age(years)	< 30	29	8.1
	31–40	185	51.7
	41–50	118	33.0
	51–60	22	6.1
	> 60	4	1.1

Source: Author's field survey, 2026.

Regarding personal demographics, the sample was predominantly male (80.2%), reflecting persistent gender disparities in Ethiopian higher education despite policy interventions aimed at promoting equity (Semela, 2014). With respect to age, most participants (84.7%) were aged between 31 and 50 years, representing a mid-career cohort with substantial professional maturity. This profile suggests leadership development programs should target mid-career staff. Additionally, universities need stronger policies to recruit and support female academic staff to address the persistent gender gap.

Table 3. *Professional demographic characteristics of respondents (N = 358)*

Variable	Category	f	%
Highest Education	PhD	88	24.6
	Master's	270	75.4
Academic Rank	Professor	3	0.8
	Associate Professor	14	3.9
	Assistant Professor	119	33.3
	Lecturer	222	62.0
Experience	< 5 years	27	7.5
	5–10	90	25.1
	11–15	144	40.2
	16–20	68	19.0
	> 20	29	8.1

Source: Author's field survey, 2026.

As shown in Table 3, most participants held Master's degrees (75.4%), while only 24.6% possessed doctorates. The majority served as Lecturers (62.0%) or Assistant Professors (33.3%), with only 4.7% occupying senior academic ranks. Additionally, 84.3% had 5 to 20 years of experience, reflecting Ethiopia's rapidly expanding university sector where mass expansion has outpaced doctoral training capacity (Teferra, 2013). This profile reveals an experienced workforce with limited doctoral qualifications and minimal senior leadership representation. Universities should prioritize doctoral training programs, strengthen mentorship initiatives, and establish clear career progression pathways to build a sustainable academic workforce.

Levels of Affective, Continuance, and Normative Commitment

Table 4. Descriptive statistics for academic staff organizational commitment (N = 358)

Organizational commitment Dimensions	Mean	SD
Affective Commitment	3.60	0.86
Continuance Commitment	3.09	0.81
Normative Commitment	3.32	1.07
Total Commitment	3.34	0.98

Note. Source: Author's field survey, 2026. Scale range: 1–5.

The first research question examined the level of each of the three dimensions of organizational commitment among academic staff. As shown in Table 4, affective commitment yielded the highest mean (M = 3.60, SD = 0.86), indicating that academic staff feel a relatively strong emotional attachment to their universities. Normative commitment was second (M = 3.32, SD = 1.07), suggesting a moderate sense of moral obligation to remain. Continuance commitment was the lowest (M = 3.09, SD = 0.81), indicating that perceived costs of leaving are the least salient driver of attachment. Overall, all three dimensions fell within the moderate range, with affective commitment approaching the higher end of the scale. This hierarchy indicates that academic staff in the sampled universities are most strongly attached to their institutions through emotional bonds, followed by moral obligation, and least through perceived costs of leaving.

Overall Level of Organizational Commitment

Table 5. *Overall composite of organizational commitment score (N = 358)*

Composite	Mean	SD	Interpretation
Overall Organizational Commitment	3.34	0.98	Moderate

Note. Source: Author's field survey, 2026. Scale range: 1–5.

The second research question examined the overall level of organizational commitment among academic staff. As shown in Table 5, the overall composite commitment score was moderate (M = 3.34, SD = 0.98). This indicates that, on average, academic staff possess a moderate level of overall psychological attachment to their universities, neither strongly committed nor disengaged. The composite score is the unweighted mean of the three subscale means (affective, continuance, and normative), consistent with the multidimensional conceptualization of organizational commitment (Meyer & Allen, 1997). The moderate overall level suggests that while a foundation of commitment exists, clear room for institutional improvement remains.

Interrelationships among the Three Dimensions

Table 6. *Pearson correlations among organizational commitment dimensions and with the composite of organizational commitment (N = 358)*

Variable	AC	CC	NC	OC
Affective (AC)	1.00			
Continuance (CC)	.27	1.00		
Normative (NC)	.50	.33	1.00	
Overall (OC)	.85	.59	.79	1.00

Source: Author's field survey, 2026. All correlations significant at $p < .001$ (two-tailed).

The third research question examined how the three dimensions of organizational commitment are interrelated and what this pattern suggests about the nature of overall commitment. As shown in Table 6, the three dimensions were interrelated but distinguishable. Affective and continuance commitment showed a weak correlation (r = .27), whereas affective and normative commitment showed a moderate correlation (r = .50). Continuance and normative commitment showed a weak-to-moderate correlation (r = .33). Affective commitment correlated most strongly with the overall composite (r = .85, 95% CI [.82, .88]), followed by normative commitment (r = .79, 95% CI [.75, .83]) and continuance commitment (r = .59, 95% CI [.52, .65]). Because the overall composite is the mean of the three dimensions, correlations between each dimension and the composite are partly determined by the composite's construction. These correlations should therefore be interpreted as reflecting the internal structure of the commitment construct rather than as independent evidence of each dimension's predictive importance. With this qualification, the pattern indicates that affective commitment shares the most variance with the composite, followed by normative and then continuance commitment.

Discussion

This study examined academic staff organizational commitment in public universities in Oromia Region, Ethiopia, using Meyer and Allen's (1997) three-component model. Findings are discussed in relation to the three research questions. Concerning the first research question, affective commitment was highest (M = 3.60), aligning with Meyer and Allen's (1997) view that affective commitment is the most desirable form of attachment. This suggests faculty retain emotional attachment to their institutions, a positive signal given its association with performance, retention, and citizenship behavior (Meyer et al., 2002; Williams & Johnson, 2023). Normative commitment was second (M = 3.32), indicating moral obligation also matters. In collectivistic contexts, loyalty is culturally reinforced, so employees may remain because they feel they ought to (Hofstede, 2001; Triandis, 1995). Continuance commitment was lowest (M = 3.09), suggesting faculty do not stay primarily because they feel trapped. This diverges from Western findings where continuance commitment often rivals normative commitment under economic insecurity (Meyer et al., 2002). The implication is clear: retention strategies based on contractual obligation or financial penalty target the least salient dimension.

With respect to the second research question, overall commitment was moderate (M = 3.34), indicating neither strong commitment nor disengagement. While a foundation exists, improvement is needed. This may reflect challenging conditions in Ethiopian public universities, including economic instability, constrained autonomy, and political interference (Aboye & Metcalfe, 2021; Assefa, 2025; Asmamaw, 2026). A moderate score is a diagnostic signal: universities cannot assume

faculty commitment is secure. Strengthening affective and normative commitment could reduce the persistent turnover intentions documented in prior studies (Dachew et al., 2016; Kebede, 2022; Tegegne & Wondimu, 2024).

Turning to the third research question, the three dimensions were interrelated but distinguishable, supporting Meyer and Allen's (1997) multidimensional conceptualization. The weak affective–continuance correlation (r = .27) suggests emotional attachment and perceived costs of leaving operate independently; faculty who feel attached are not necessarily those who feel trapped. Administrators should therefore not assume that building emotional attachment alone will reduce turnover driven by financial concerns. The moderate affective–normative correlation (r = .50) indicates overlap but not redundancy. This differs from Western samples where overlap is stronger, suggesting that in collectivistic contexts, emotional attachment and moral obligation operate more independently (Hofstede, 2001; Triandis, 1995). This challenges the model's assumed universality and suggests cultural calibration is needed. Correlations with the composite—affective (r = .85), normative (r = .79), and continuance (r = .59)—indicate affective commitment shares the most variance. However, because the composite is mathematically derived from the same items as the subscales, these correlations reflect internal structure, not independent prediction. Affective commitment is therefore the most central dimension; continuance commitment is the least central.

Conclusion

This study examined academic staff organizational commitment in five public universities in Oromia Region, Ethiopia, using Meyer and Allen's (1991, 1997) three-component model. Three principal conclusions emerge. First, academic staff reported moderate levels across all three commitment dimensions. Affective commitment was most salient (M = 3.60, SD = 0.86), followed by normative commitment (M = 3.32, SD = 1.07), while continuance commitment was least salient (M = 3.09, SD = 0.81). Faculty attachment is therefore driven primarily by emotional bonds, secondarily by moral obligation, and least by perceived costs of leaving. The three-component model retains structural validity in this non-Western context, although the relative salience of its dimensions appears culturally conditioned. Second, overall commitment was moderate (M = 3.34, SD = 0.98), indicating neither strong commitment nor disengagement. While a foundation of attachment exists, improvement is needed given the challenging conditions in Ethiopian public universities. Third, the three dimensions were interrelated but distinguishable. Affective commitment correlated most strongly with the composite (r = .85), followed by normative (r = .79) and continuance commitment (r = .59). Affective and normative commitment showed a moderate correlation (r = .50), whereas affective and continuance commitment showed a weak correlation (r = .27). Because the composite is mathematically derived from the same items as the subscales, these correlations reflect internal structure rather than independent prediction. The moderate affective–normative correlation, weaker than in Western samples, suggests emotional attachment and moral obligation operate more independently in collectivistic contexts, inviting cross-cultural specification of the model. Practically, continuance commitment was lowest and had the weakest correlation with the composite, indicating that strategies based on contractual obligation or financial penalty target the least salient dimension. For Ethiopian public universities facing attrition, investment in affective and normative commitment through recognition, participatory governance, and community building may offer a more viable retention path than bond requirements, though longitudinal validation is required. These conclusions position the study as a diagnostic baseline for sampled universities and a methodological reference for future research in under-studied contexts.

Recommendations

Based on the findings, the following recommendations are offered for policy, practice, and future research. For the Ministry of Education, greater policy weight should be given to affective commitment within faculty development frameworks. This could include incorporating an affective commitment indicator into university performance evaluation, supporting leadership training on faculty recognition and participatory decision-making, and strengthening institutional ties with doctoral candidates. Because continuance commitment was the least salient dimension, retention strategies anchored in contractual obligation or financial penalty are unlikely to strengthen overall attachment. The Ministry should therefore review compensation policies to ensure faculty salaries cover basic living expenses, protect institutional autonomy, and support universities in creating responsive academic environments.

For university administrators, attention should be directed toward conditions that foster affective and normative commitment rather than relying mainly on contractual retention mechanisms. Recommended actions include structured career development discussions between faculty and leaders, recognition of academic community building in promotion criteria, and college-level initiatives to improve commitment conditions. Because affective and continuance commitment operate relatively independently ($r = .27$), administrators should combine affective-focused strategies with financial and career-security measures, avoiding the assumption that a single retention strategy will address all dimensions of commitment. Periodic commitment surveys should also be conducted to monitor changes over time and inform institutional action plans.

For deans, department heads, and academic staff, recognition and support should be embedded into routine departmental practice, since affective commitment is shaped largely through day-to-day experiences with immediate supervisors (Meyer & Allen, 1997). Recommended practices include acknowledging faculty achievements in departmental meetings, holding regular development conversations, involving faculty in resource allocation decisions, and forming peer writing groups and teaching partnerships.

For future research, five priorities are proposed. First, longitudinal designs are needed to establish temporal relationships between working conditions and commitment. Second, studies should examine antecedents of each commitment dimension in the Ethiopian context, including compensation adequacy, workload, research support, leadership quality, and work-life balance. Third, qualitative approaches would complement quantitative findings by exploring faculty experiences in depth. Fourth, comparative studies across public and private institutions and across regions could reveal contextual variations. Fifth, and most importantly, future researchers should use a separate global commitment measure rather than a composite of the three subscales, thereby enabling genuine predictive analysis and avoiding the part–whole dependency identified in this study. Finally, future studies should draw from a larger and more representative sample of universities to improve generalizability.

Limitations

This study has the following limitations. First, the cross-sectional design prevents causal inference; the findings describe associations at one point in time and cannot track how commitment develops or changes. Second, only 5 of 13 public universities participated due to distance, cost, and regional conflict. Findings may not generalize to the remaining eight universities or other regions. Third, self-reported data are susceptible to social desirability bias and recall inaccuracies, even though Harman's test indicated no major common method bias. Fourth, the composite score was computed as the mean of the same 18 items constituting the three subscales, creating a part–whole relationship.

Correlations between each dimension and the composite are partly determined by the composite's construction and should be interpreted as reflecting the construct's internal structure, not independent predictive importance. Fifth, no separate global commitment measure was included, preventing a genuine test of whether the three dimensions independently predict overall commitment. Future research should: (a) use longitudinal designs; (b) include more universities; (c) supplement surveys with qualitative methods; (d) use a separate global commitment measure; and (e) employ analytical approaches free of part-whole circularity, such as profile analysis, MANOVA, or structural equation modeling.

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Opinion / Viewpoint:

Strategic Planning for Higher Educational Institutions

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Abstract

This paper explores the role of strategic planning in higher education institutions (HEIs) and offers a structured, non-linear strategic planning process to engage and meet stakeholder needs in a rapidly changing, complex environment. The study employed a content review, synthesising best practices, policy documents, and academic literature. The study finds that the strategic planning process should be non-linear, iterative, accommodative, and inclusive. Similarly, the study acknowledges the leadership role in promoting and implementing strategy in real settings. study provides a novel perspective for developing an adaptable and flexible framework, tailored to stakeholders' needs and requirements, leading to an integrative and forward-looking strategic framework for HEIs.

Keywords: strategic planning process, higher education institutions, emergent strategy, deliberate strategy

Introduction

Strategic planning empowers organizations to plan the future within the available resources for competitive advantage. Its role becomes more critical amid uncertainties, complexities, and obscurity to envision organizational goals and attain strategic objectives. Like other sectors, for higher educational institutions (HEIs), strategic planning is foundational to operating in the rapidly changing and increasingly complex learning environment (Amina, 2024). It enables HEIs to clearly define their vision, mission, and strategic goals aligned with the changing needs of the customers. It enhances performance, fosters decision-making processes, and enables HEIs to adapt and adapt, mitigate risk, gain competitive advantage and achieve sustainable growth in the long term. Additionally, strategic planning envisions opportunities and plans for them to be achieved in the most suitable, viable, optimal, and desirable manner (Baxter, Floyd, & Jewitt, 2023). At the same time, it also reduces risks and threats due to proactive planning. However, this process should be systematic, synchronous, comprehensive, and accommodative, covering HEIs' vision, mission, goals, and actions (Baxter, Floyd, & Jewitt, 2023; Sarpong, 2023). However, strategic planning in HEIs mostly follows a traditional linear approach, which often fails to capture the dynamic and complex operations and processes of HEIs. Secondly, often using one method or methodology may not cover the expected domains and areas; therefore, a more robust, adaptive, and data-driven approach is needed for organizational agility, stakeholders' engagement, and sustainability. The study deploys content review to assess a more resilient, inclusive, and responsive strategic planning process in HEIs. The study proposes a stakeholder co-creation model using systems thinking, agile leadership, and evidence-based decision-making skills for HEIs' strategic planning and management.

Debate

There are different models and perspectives on strategic planning. This section represents some basic models and theories for strategic planning in HEIs. *Henry Mintzberg* presented his perspective that strategic planning should be recursive and non-linear and should include deliberate and emergent approaches to achieve strategic goals objectively. This model fits the HEIs' planning process, as the emergent perspective presents flexibility and adaptability (Zechlin, 2010; Mintzberg & Rose, 2003). It accommodates uncertainties, unforeseen challenges, threats, opportunities, and insights through learning and experimentation. The inclusion of these emergent factors fosters innovation and agility, and actively engages stakeholders through environmental scanning, monitoring, and embedded feedback (Mintzberg & Rose, 2003). Besides this, deliberate strategy shares organizational vision and mission among all knowledge workers. They all set desired targets and key performance indicators and accordingly allocate resources for them. This combination of emergent, deliberate, accommodative, inclusive, iterative, and non-linear strategic planning processes strikes the right balance and develops a stable framework and innovative culture in HEIs. In the same way, leadership should be agile to integrate both strategic planning and create a culture of foresighted and adaptive decision-making in an objective manner (Saah, 2017; Mintzberg & Rose, 2003).

Similarly, *Michael Porter*'s proposition has equal implications for HEIs' strategic planning to define their competitive positioning through possible ways of cost leadership, differentiation, and focus to gain a competitive edge. Regarding cost leadership, HEIs need to be cost-conscious to expand their working and learning scope through economies of scale, optimizing operations, and strategic partnerships with industry. Likewise, through differentiation, HEIs can offer unique, flexible (online, hybrid mode), market-led, industry-relevant, research-focused programs through local community engagement to attain a focused competitive advantage (Schneider, 2024; Sum & Jessop, 2013; Curran, 2000).

Conclusion

The review concludes that the strategic planning process in HEIs should be dynamic, flexible, iterative, inclusive, accommodative, and non-linear. All stakeholders, including the local community and their indigenous knowledge, should be embedded (co-creation) in developing strategic plans. It should allow room for emergent, deliberate, contingent, and non-contingent modules. Moreover, the study concludes that a model for strategic planning should be resilient, value-added by experts and the local community, and supported by agile leadership for better implementation.

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ChatGPT V4 was used for language improvement, which was reviewed later by the author.

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