Relationality and Learning in Oceania

Contextualizing Education for Development

Seu'ula Johansson-Fua, Rebecca Jesson, Rebecca Spratt and Eve Coxon (Eds.)

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Relationality and Learning in Oceania

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Cover illustration: Afa Government Primary School, Tonga, photograph by Elaine Umali, 2019

All chapters in this book have undergone peer review.

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Foreword

As a Pacific Islands educator whose research, policy, teaching and engagement interests relate to comparative and international education (CIE) and international development, and one who has traveled widely and worked extensively within the Pacific Islands region for more than three decades, I have always been impressed with the credibility and caliber of some of my colleagues in Oceania. For me, the authors of this publication are a group of scholars whose credibility is supported by the consistency of their scholarship, the adequacy of their thought leadership and the relevance of their insights about Pacific Islands settings. I am therefore delighted to see this publication; a valuable book which is based on the authors' multi-year New Zealand aid-funded education intervention program in two Pacific Islands nation states—Solomon Islands and the Kingdom of Tonga.

In this book, the authors have started to offer a counter narrative to the often-used managerial perspective to educational interventions (via international development). They do so by saying that international development encounters must be approached relationally. As CIE scholars, the authors are engaging critically with issues of place, context and culture. By taking a positive stance, the authors are able to affirm context as a complex reality to embrace and understand rather than as a problem to ignore. Such a perspective is collaborative and hopeful and, by adopting it, the authors are able to offer a fresh contribution to the wider CIE scholarship on north-south and south-south scholarship.

In contextualizing education for development in Oceania, the authors have woven together a three-strand tapestry as follows: First, as stated, in international development, context matters. When our encounters with each other seriously take context into account, we're likely to have a better glimpse of the assumed multiple and potentially conflicting worlds of our underpinning realities. As a sociological example, using the case of Tonga, there is a fundamental dilemma for north-actors whose assumed sociological culture is autonomous in nature whereas their Tongan south-actors are likely to be operating from a heteronomous culture. Without exposing this sociological dilemma, the context behind the context for a north-south encounter in Tonga is unlikely to be deep and relationally significant.

Second, in education generally as well as in international development interventions, relationality is key. By centering relationality, this book shows the importance of agency at each and all levels of education and international development endeavors. Moreover, the interactions, mechanisms and connections between people—learners, teachers, parents, administrators, etc.—and

roles are important. Centering relationality highlights meaning and with this, its associated challenges. One of these being that in our encounters with each other, we have the prerogative of choice. However, the outcome of our choice is not a privilege that we determine. As south-south or north-south actors in a more relational approach to international development we therefore have to learn to live with each other relationally as well. Third, the authors have highlighted the importance of learning. In this book, the authors have expanded beyond the usual learning by students and have included learning by teachers, parents, policy makers, education administrators as well as international development actors. Calling for the centering of learning that embraces indigenous Pacific understandings and frameworks in international development is new and long-overdue. For the Pacific Islands region, this new call is potentially exciting as it promises fresh ways of more relational engagements in south-south and north-south encounters.

In closing, I restate that there is much value in this exciting book and I congratulate the authors for gifting this to us at this time when people relationality needs to be highlighted in our CIE encounters with each other.

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'Oku 'i ai 'a e hounga`ia pea mo e koloa`ia `i he faingamalie ne mau ma`u ke fakahoko ai ha poupou ki he langa fonua pea mo e langa fale ako ma`ae fanau, ka ko e tofi`a pea mo e kaha`u `o Tonga.

Mifa hapi tumas fo duim waka fo sapotim skul blo oketa pikinini wea oketa na bae fiusa blo Solomon Aelan.

Awi bzkr mz lr Nendr, mz naodqngr, naokangr x naeglrngr nzklakrdr dwake nztopquan.

The opportunity we have been given through these programs to serve and support education in Tonga and in Solomon Islands, has been an honor. Through these programs, we have learned about learning, about context, about relationships, about ourselves and most importantly about the strengths of Pacific children. This learning was made possible due to the generosity of many people who have shared their knowledge and experiences with our team.

We wish to thank the school leaders and the teachers of the schools for trusting us to be part of their community and to enter their classrooms. The learnings that we have gained from these schools are evident in this book. We also thank the Education Officers and Provincial Education Authorities who have guided us and shared with us their rich experiences and knowledge. We wish to thank the Ministry of Education and Training in Tonga and the Ministry of Education, Human Resources and Development in the Solomon Islands for the support and the willingness to participate in the learning.

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Abbreviations

ABC	Ask Build Check
AfL	assessment for learning
AUL	Auckland Uniservices Ltd.
CHS	community high schools
CIE	comparative and international education
DBR	Design-Based Research
DFAT	Department of Foreign Affairs and Trade
EA	Education Authorities
EGRA	Early Grades Reading Assessment
EQAP	Educational Quality Assessment Program
GPE	Global Partnership for Education
HDI	Human Development Index
HLM	hierarchical linear modeling
LALI	Literacy and Leadership Initiative
LOI	languages of instruction
M&E	monitoring and evaluation
MDGS	Millennium Development Goals
MEHRD	Ministry of Education and Human Resource Development
MEL	Monitoring, evaluation, and learning
MET	Ministry of Education and Training (Tonga)
NPM	new public management
NSS	National Secondary School
OCIES	Oceania Comparative and International Education Society
PacREF	Pacific Regional Education Framework
PCK	pedagogical content knowledge
PDIA	Problem Driven Iterative Adaptation
PEA	Provincial Education Authority
PEARL	Pacific Early Age Readiness and Learning
PILL	Pacific Island Literacy Levels
PILNA	Pacific Island Literacy and Numeracy Assessment
PLD	professional learning and development
PNG	Papua New Guinea
PSS	provincial secondary schools
RBM	Results Based Management
SEE	school entrance examination
SIDS	Small Island Developing States
SPBEA	Secretariat for the Pacific Board of Educational Assessment
SPBEA	South Pacific Board of Educational Assessment

SWAP	sector-wide approach
TCF	Tonga Curriculum Framework
TEGRA	Tonga Early Grade Reading Assessment
TLS	Temotu Literacy Support
TSDFII	Tonga Strategic Development Framework
UNESCO	United National Educational, Scientific, and Cultural Organization

Notes on Contributors

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Introduction: Education for 'Development' in Oceania

Eve Coxon

Abstract

Following a brief outline of how this multi-authored volume came to be, and the key lines of argumentation upheld throughout, this introductory chapter provides a brief overview of what the region of Oceania comprises. With reference to the work of Epeli Hau'ofa (1993, 1998), a vision of Oceania as a post-colonial 'relational space', which has underpinned the theoretical–conceptual framing of subsequent chapters, is introduced. Suggested is that Hau'ofa's work constitutes both a 'southern theory' and a means to counter the 'hegemonic regionalism' informing dominant regional discourse largely driven by Oceanic countries of the 'north'.

A brief discussion of education in the Pacific Islands countries of Oceania highlights both the complexities of a regional approach given the extreme levels of diversity within the region, and the commonalities in educational challenges across (Coxon & Munce, 2008). Posited is the need for epistemologies indigenous to the Pacific Islands to have a crucial place in education for sustainable and transformational development (Johansson-Fua, 2016), and for our intervention to address the north/south relationship that characterizes education aid throughout the region. The key themes and concepts highlighted in the title of the book and which permeate throughout—'context', 'relationality', 'learning'—are then discussed, as are the chapters comprising each of the three parts of the book: Contextual and Methodological Framings; Learning for Human Development and Learning for International Development.

1   Introduction

This volume draws on an aid-funded education intervention which aimed to enhance literacy knowledge and skills among system and school leaders, teachers, and students in Pacific Islands primary school systems. With funding provided by the New Zealand government and the governments of the countries involved, it was designed and delivered collaboratively by a team of researcher-practitioners from the University of the South Pacific and the University of Auckland. Within this 'education for development' collaboration, the research-practice partnership undertaken over four years established communities of practice involving school leaders and teachers, Ministry of Education officials, and community members. Research findings and experiences from intervention programs undertaken in two of the Pacific countries involved—the Temotu Literacy Support (TLS) program in Solomon Islands, and the Literacy and Leadership Initiative (LALI) in Tonga—informed the book's conceptualization and development.

In entitling the book: Relationality and Learning in Oceania: Contextualizing Education for Development, we hope to address many debates of current interest and concern to scholars and practitioners in two important areas of research and practice: comparative and international education (CIE) and international development. The chapters comprising the volume uphold a broadly defined notion of comparison and a concept of 'development' that goes beyond the still prevalent economistic understanding and recognizes its contested nature. The advantage of interdisciplinarity and theoretical and methodological eclecticism in designing and delivering a research based, aid-funded intervention is asserted. Such features are perceived as enabling openness to the innovative research approaches and collaborative research relationships required to inform sustainable development. A key line of argumentation throughout is that south-north and south-south relational research approaches which center the importance of context and culture (Crossley, 2010; Lee, Napier, & Manzon, 2014) are required to inform 'education for development' in Oceania and globally, and to strengthen educational interconnectedness within the relational space of Oceania.

The complexities of literacy and language development in bi- and multi-lingual contexts are a key focus of investigation. Argued is that because literacy in such contexts is social, textual, and cognitive, and entails using languages powerfully to achieve important and socially meaningful ends, it is not a 'basic' skill as the international development discourse would have it. Literacy teaching therefore should not be regarded as the imparting of basic knowledge. It requires building on students' current language expertise, enabling them

to draw on their cultural and linguistic resources and use them as tools for learning.

The potential of a design-based research (DBR) approach to the design and implementation of interventions to be delivered through education aid is also explored throughout the volume. DBR is argued to be effective in bringing about sustainable improvements in school leadership, teacher practice, and student learning, in part through its emphasis on attending to local values, contexts, and variability. As such, it is maintained that DBR has potential for redressing the shortcomings inherent in many education aid programs which are insufficiently contextualized and inadequately theorized (Jesson & Spratt, 2016). The current results-based management approach upheld by those who shape international development discourse is argued to be a barrier to learning in its neglect of relationality and context. DBR is offered as an alternative approach to effective aid delivery in that it equally privileges relationships, context, and results.

While not denying the power of global education agenda and the 'education for development' discourses which shape regional and national policies, especially given the high degree of aid donor presence within Oceania, attention is drawn to the extent to which local educational practices are enacted by education communities, teachers, and learners. These may be embedded within the constraints of global educational forces, but their first points of reference are the social relations which inform the contextually derived identities and understandings of those concerned (Coxon, 2009). As indicated in this book, the peoples of the small island 'developing' states of Oceania continue to exercise collective agency in articulating socio-political and cultural continuity within change, including that introduced through global development agenda. Maintained is that the development of educational policies and practices in such contexts is a negotiation between historically developed local 'traditions' and the global imperatives shaped by dominant development discourses.

This volume responds to calls from the wider CIE community for critical engagement with issues of context and culture, and the significance of indigenous epistemologies (Lee et al., 2014; Takayama, Sriprakash, & Connell, 2016). It agrees with the statement that "…comparative education always works in dialectics, considering views that seem to be in opposition, but at the same time generating richer meanings in the process of considering such opposing views" (Lee et al., 2014, p. 146). Such a view demonstrates the potential for a theoretical and methodological framework embedded in relational terms that aligns with the reality of dialectics between global/local, universal/particular, south/north, insider/outsider. And importantly, given the location of this book within a World Council of Comparative Education Society (WCCES) series, it

speaks directly to WCCES's mission to champion the notion of 'indigenous fusion by choice' between indigenous and externally introduced knowledge systems.

These broad themes and lines of argumentation are elaborated in subsequent chapters (Chapters 2–10). Before outlining these chapters, however, included here is a brief overview of the region of Oceania, and a 'southern' theory (Connell, 2007) for a critical Oceanic regionalism. This is followed first by a brief discussion of education in the Pacific Islands countries (PICs) of Oceania, and then by some key points about the other concepts highlighted in the book's title—'context', 'relationality' and 'learning'—and which permeate throughout.

2   Oceania

As defined by United Nations agencies and many other international and regional bodies, the region of Oceania includes the 'developed', Pacific Rim states of Australia and New Zealand, the relatively large 'developing' state of Papua New Guinea (PNG), and a number of small island states and territories located within the so-called Pacific Basin. These 22 Pacific Islands countries represent a large proportion of the world's smallest states, all of which are categorized according to various indexes as 'developing' or 'least developed'. Per capita, Papua New Guinea and the Pacific Islands states and territories make up the world's most aid-dependent (sub) region.

Over the past 10–15 years, a number of Oceanic academics and commentators have developed a critique of moves, largely driven by Australia and New Zealand, towards what they term "hegemonic regionalism". They identify the challenge of reclaiming regionalism from "the clutches of neoliberalism" (Fry, 2006, pp. 14–15), and investing it with the building of sustainable, equitable societies; of developing a critical Oceanic regionalism within a system of regional governance centered less on economic integration and more on human rights and social well-being (Stone, 2011).

The Oceanic regional model revived by these debates was advanced by the late Epeli Hau'ofa (1993) in his seminal work, Our Sea of Islands. Hau'ofa provided an alternative to the prevalent regional perspective of the time, "the economistic and geographic determinist view" (p. 6) which he saw as maintaining the power relations of colonial times between 'developed' countries and the small island 'developing' states and territories within Oceania. He focused on the Pacific Ocean as a shared post-colonial space for both the revitalization of the pre-colonial interconnectedness of Pacific peoples and the development of extensive and expansive new connections with Pacific Rim countries,

particularly Australia and New Zealand, of "a vibrant and much enlarged world of social networks that crisscross the ocean…" (Hau'ofa, 1998, p. 391). Hau'ofa's ocean-centric approach attributed the development and survival of the complexity of societies which make up the most culturally and ecologically diverse region in the world to the ocean. His spatial-temporal analysis, in which the natural environment and society continue to condition and shape each other, presented Oceania as a relational space (Coxon, 2011, p. 6).

Underpinning the approach taken in the development and delivery of the intervention programs central to this book was a shared commitment to Hau'ofa's vision for Oceania, one in which the ontologies and epistemologies indigenous to the region have a crucial place in education for sustainable and transformational development (Johansson-Fua, 2016). Also acknowledged, however, is that Oceania is a region in which wealth and power relationships exacerbate educational inequalities that have long been characteristic within and between regional sub-groups. The north/south relationship between Australia/New Zealand and Pacific countries, particularly as exemplified through education aid (Coxon, 2016), was a further issue of concern requiring address by the researchers involved in the intervention.

3   Education in Pacific Island Countries

Within the literatures of both comparative education and international development, 'small island developing states' (SIDS) are recognized as bringing particular challenges to 'education for development', many of them related to smallness, remoteness, geography and climate, as is the case for Pacific Islands countries (Thaman, 2015, p. 208).

The 22 Pacific states and territories are frequently divided into three sub-regions—Melanesia, Micronesia, and Polynesia—each characterized by different cultures, histories, geographies, and environmental conditions, resulting in quite marked variations in levels of economic and human development. Together they "exhibit an unparalleled diversity of culture and language as well as great variation in physical and political characteristics, both between and within the three sub-regions" (Coxon & Munce, 2008, p. 150).

Despite these differences however, Pacific Islands countries share many 'development' challenges: their economies are small and remote from markets; they are reliant on a narrow base of exports (fish, agricultural products, timber, tourism, and labor) and the importation of many basic commodities; they are extremely prone to natural disasters and the effects of climate change; population growth in many of the countries is outstripping the capacities of the health and education systems to provide adequate basic services, resulting

in high levels of out-migration from some countries; and the historically developed relationships with former colonizing countries mean that remittances and aid form a substantial part of many Pacific Islands countries national budgets (ibid., p. 152).

Although patterns of educational access, retention, and achievement vary, many education issues are found in each country insofar as they arise from the common development challenges and economic constraints identified above—inadequate facilities, difficulties provisioning geographically dispersed schools, increased numbers of school age populations, insufficient numbers of qualified teachers, and limited transport and communication infrastructure. Also shared is governance through relatively centralized systems, with national Ministries being responsible for teacher professional learning and development, curriculum design, and resource provision (Jesson & Spratt, 2017). While it has long been the case that most of all Pacific Islands government education budgets are dedicated to payroll, the influence of global and regional education agenda on national systems' policies and processes in recent decades, combined with local expectations of expanded educational provision, means that many Pacific Islands education systems have become increasingly reliant on international aid for meeting basic education services as well as for ongoing development.

However, even with high proportions of national budgets and considerable external donor assistance being committed to the reforms promoted through the 'education for development' discourses of recent decades, evidence indicates that sustained improvements in educational performance remain elusive and that the "effectiveness of most education systems is deemed to be poor" (Thaman, 2015, p. 209).

In relation to the primary school sub-sector (the focus of the interventions explored in this volume), during this time a proliferation of projects involving bilateral and multilateral agencies have focused on improving primary students' outcomes. But these initiatives have largely failed to address widespread concerns about the quality of teaching and learning in Pacific primary schools, specifically the perceived decline in the levels of literacy.

Despite this, all Pacific Islands governments continue to uphold the common objective of universal provision of quality and relevant primary education, and aid to education is seen by all parties as having a crucial role in this process. While regional educators are concerned to mitigate the effects on education arising from the constraints identified above, they also identify the ongoing constraints arising from colonial and neo-colonial structures and processes as a major barrier to quality improvements. They draw attention to the extent to which 'education for development' discourse and practice fails to take into account the complexity of social and cultural factors within which

education is located, and that substantive questions about the quality of educational structures and processes—issues about what is taught and how—are ignored. They have long argued for the need for recognition of the educational structures and processes of indigenous knowledge systems in order to enact transformative, empowering and culturally appropriate teaching-learning environments in Pacific schools (Thaman, 2008; Coxon, 2009).

4   Key Concepts

4.1   *Context*

The significance given to the concept of 'context' is endorsed by recent theorizing and research literature in both comparative education and international development, specifically with regards to the overwhelming case made for the importance of context to teaching and learning initiatives in 'developing' country settings (see for example, Crossley, 2010; Tabulawa, 2013).

Notwithstanding the evidence that 'context matters', it is maintained here that the concept of context often has been considered unproblematic within the international development and comparative education fields; treated as no more than a set of features of the immediate local setting that are to be identified, described, and responded to (Spratt, 2016). Such a conceptualization presents 'context' as a set of challenges for the designers of an intervention to manage or mitigate, a way of thinking deeply embedded in international aid which according to Mosse (2011), "emphasizes universal over contextual knowledge…that constantly organizes attention away from the contingencies of practice and the plurality of perspectives" (p. 87).

This book's approach is in agreement with those who have argued for a more relational and process-oriented perspective, one that frames context not as an entity of a collection of features to be categorized and defined against a predetermined 'norm of comparison', but as a lived dynamic which is inherently relational; in Dilley's (1998) words "a process or set of relations…not a thing in itself" (p. 5).

The research-practice team therefore embraced a relational perspective, one in which the 'context' of each intervention was seen as comprising relationships between social actors, idea, and institutions that are shaped by their interactions with each other; of context as a process, a set of dynamic relationships at various levels within the context.

4.2   *Relationality*

The significance of context is further supported as the means of understanding the domains of social relationships within which school communities exist.

Fundamental to the relationality theme which underpinned the research-practice education interventions informing this and subsequent chapters, is the recognition that cultural identity formation within indigenous Oceanic societies is relational rather than individualistic.

For LALI team members, central to their interactions was the Tongan/Polynesian notion of *vā*—the socio-spatial connection between persons, a relational concept which articulates the connectedness between people, and between people and their environment, and which must be nurtured (*tauhi vā*) and protected (*tauhi vā ha'a*) so it remains strong (Thaman, 2008). Understood was that the sharing of common spaces through LALI implies relationships of connection or separation; that awareness of *vā* implies an obligation to care for the relational research-practice space between the people or institutions involved through conscious actions (Airini, Anae, Mila-Schaaf, Coxon, Mara, & Sanga, 2010).

In the case of TLS, recognized was that social relationships play a critical role in Solomon Islands/Melanesian political, social, and economic life; individuals are constituted and bound by their relationships to others and as such are 'relational persons' embedded inextricably in social relationships (Spratt, 2011, p. 5). Consistent with this, TLS members adopted the culturally and contextually relevant approach of *tok stori*, a relational activity which creates a mutually beneficial relational space and "mode of learning" for the researcher-practitioners and those with whom they interact (Sanga & Reynolds, 2018, pp. 13–17).

Both interventions acknowledged Education as a relational activity, one in which the space connecting researcher-practitioners and educational communities was focused on the development of contextually appropriate and robust research practices that could lead to the generation of new knowledge and understandings, and lead to improved learning.

4.3   *Learning*

Every feature of the intervention program's design and implementation addressed the overall goal of improved student learning. But although 'learning' primarily addressed the needs of the students, it was conceptualized more inclusively to encompass leaders, teachers, communities, Ministries, the research-practice teams, and others involved in the program's delivery. The approach taken demanded that 'learning *from*' (O'Connell, 2007) the context of practice was accepted as fundamental to educational intervention and determining of both content and process; that all involved from across the various socio-cultural and educational contexts should see themselves as learners. An essential element in the development of the trusting and respectful

relationships required for this approach, was the program's acknowledgement of the relationality that is central to indigenous Oceanic societies, and of education as a relational activity.

In shaping our book to highlight the centrality of 'learning' in our theory and practice and that this would address an identified gap in our targeted research fields, we have drawn on Daniel Wagner's (2017) recent publication, *Learning as Development: Rethinking International Education in a Changing World.* Wagner (2017, p. 2) maintains that learning is fundamental to both dimensions of 'development': human development and international development, yet 'education and development' has paid little attention to 'learning', or its variations in different cultural contexts.

Wagner (2017) also calls for well-designed education interventions based on more culturally specific and locally informed perspectives, and that demonstrate understanding of how beliefs, values, and practices are shaped by culture and context. He maintains that "…empirical evidence is the currency of successful intervention" (ibid., p. 4) and that such evidence should be collected at school level by those who have in-depth understanding of the local context and languages (ibid., p. 42). Moreover, that although teachers are an essential factor in determining what and how well children learn, many teachers do not have the knowledge and tools to gauge what their students are actually learning (ibid., pp. 56, 65).

4.4 *Learning for Development: Our Debt to Wagner*

It was not until early 2018 that we discovered Wagner's book and its identification of two key dimensions of 'learning for development', and, importantly, its attention to what comprises an effective education intervention with a focus on student learning improvement. This was co-incident with the completion of the four-year interventions explored here, at a time we were finalizing our internal impact evaluation of the intervention program. Also at that time, we were engaged in a preliminary exchange of ideas about the production of an edited volume reflecting on the processes of designing and implementing research-practice interventions for improving literacy learning, within an 'education for development' program in Oceania.

It was encouraging and exciting to read of Wagner's affirmation of what had been our interventions' broad aim: to enhance student learning by focusing on primary schools and classrooms as productive learning environments. Also affirming was the extent to which he indicated support for many of the principles that had informed our work: the importance of motivating school leaders and teachers to view themselves as learners; the significance of early grade literacy in mother-tongue; the need for texts in languages appropriate to

the learning environment and level of learning; the desirability of easy to use school-level assessment tools, and the necessity of locally generated and well analyzed data for monitoring learning over time.

Most significantly in terms of our book's already identified broad themes was Wagner's explicit identification of the variability of learning across contexts, and how understandings of teaching and learning are shaped by the socio-culture concerned. His attention to the role of the global education agenda upheld by international aid agencies in influencing the 'what' and 'how' of education interventions (Coxon, 2009), an area of significant concern to Pacific Islands 'developing' states in Oceania and already determined as a focus for this book, was of further interest.

The following chapters demonstrate the extent to which our book engages with and illuminates some of the topics and debates addressed by Wagner's much more wide-ranging book. The nine chapters are divided into three parts, with Parts 2 and 3 entitled in accord with Wagner's two development dimensions.

5   Part 1: Contextual and Methodological Framings

The first of the three chapters comprising Part 1 (Chapter 2) explores the 'education for development' context of each of the intervention sites, Solomon Islands and Tonga. Each country is profiled (albeit briefly), highlighting that although they both fit the label of SIDS, there are marked differences between them in cultural, educational and 'development' terms. In tracing the historical development of formal schooling in each country, the chapter contextualizes education within wider socio-historical and political contexts. Emphasized is that the meanings and values which inform Solomon Islands and Tongan peoples' social relationships and everyday material practices, continue to be shaped by distinct local 'traditions' and culture histories. The interplay of culture and education is seen as central to the operations of today's systems, schools and classrooms. Also accepted is that the social structures, values and practices developed through time within a specific context continue to shape and enable teaching and learning.

Chapter 3's discussion of 'relationality' upholds the significance of context to understanding the domain of social relationships (the context behind the context) within which school communities exist. It proposes a metaphorical *Motutapu* as a relational space in which 'insider' and 'outsider' researcher-practitioners can both co-explore more authentic south-north and south-south dialogue, and co-construct the robust research approaches that would generate new knowledge for improved learning. It draws on Hau'ofa's reimagining

of Oceania as a space for all who call the region home, and the relationships between them, as the bases for alternative 'education for development' pathways and a more holistic sense of 'regionalism'.

The design-based research methodology informing intervention development and implementation, as discussed and detailed in Chapter 4, positions itself in terms of relationality and the other two key themes of context and learning. At the heart of the DBR approach is a set of partnership relationships, thus DBR is inherently relational. The DBR approach addresses educational challenges and simultaneously contributes to an understanding of the educational processes of specific contexts, by intentionally building on what is present within a context. The co-construction and application of tools for the collection of empirical data serves the purpose of building capability within context and developing knowledge and understanding of the relationship between teaching and learning. The chapter details the various processes undertaken with and for the people within a specific context, thus ensuring a contextually appropriate and sustainable intervention aimed at enhancing student learning outcomes.

6   Part 2: Learning for Human Development

Chapter 5, entitled 'Literacy learning', begins by asserting that literacy and language are inextricably entwined and can be considered as cultural tools for thinking. It maintains that becoming literate is at once a cognitive, social and cultural activity which is not only school bound, but is cultural, intergenerational, and social. In school systems, however, these important literacy foundations are often unrecognized and underexplored; classroom literacy activities are bounded by purposes and definitions of literacy in curriculum statements, and by teachers' beliefs about what students can achieve and what it is important to learn. This chapter describes how these conceptions of literacy were nudged within an intervention paradigm which problematized school based, sometimes monolingual, notions of literacy.

Literacy and language issues are further explored in Chapter 6, focusing on one aspect of the intervention which took place in the remote Solomon Island province of Temotu. Drawing on theories of language pedagogy in multilingual settings, which deeply support vernacular literacy and deliberate multilingual practices in the classroom, the chapter reviews the current language policy and curriculum environment of Solomon Islands. Solomon Islands is a highly complex language situation with 71 recognised living vernaculars and an English-based creolizing pidgin as the major lingua franca, but in which English literacy is regarded as the key learning outcomes for all schools. The

chapter describes how vernacular literacy was incorporated into classrooms that were well-entrenched in an English-only system.

In Chapter 7, Pedagogy and Relationality, both universalist assumptions of knowledge and knowing, and the pedagogical binary of teacher-centered and student-centered that frequently informs the understandings of classroom processes by international development agencies and actors, are explicitly abandoned. Recognized is that teachers' beliefs, values and practices are shaped and informed by the cultural contexts in which schools exist. Underpinned by a metaphor of weaving, and using culturally informed dialogue through *talanoa* combined with notion of dialogic pedagogy, the chapter explains how empirical investigations into classroom interactions, with a focus on teachers' understandings of their own practices and their effects on student learning, became the basis of an exploration into the development of contextually based pedagogies.

Chapter 8 is concerned with Assessment. It begins by asserting the need for increased attention to the globalization of 'assessment regimes', and the parallel regional benchmarking and assessment programs being promoted and supported by international aid agencies for 'developing' countries in Oceania. Juxtaposed against this is the 'assessment for learning' approach which informed the research-practice interventions addressed in this book. Because initial research revealed that teachers had little evidence upon which to make informed judgements about their teaching and their students' learning, easy to use formative assessment tools were co-constructed for each country context. The chapter provides evidence that the development and use of these formative assessment tools was identified as a powerful means of building pedagogical knowledge and improving teacher practice and student learning.

7   Part 3: Learning for International Development

Chapter 9's focus on evaluation maintains that results-based management and the desire to ascertain evidence-based 'best practices' impact heavily on aid funded school improvement interventions. Counter to this, however, is a growing recognition that the context-specific and complex nature of generating improvement in schools and education systems requires adaptive approaches to intervention design that allow for solutions to emerge from the context. The chapter addresses the blurring of lines between intervention and evaluation, arising from the design-based research approach to the interventions at the heart of this book, with a focus on the relational processes central to both. The importance of valuing indigenous knowledges and the potential role of indigenous research methodologies for monitoring and evaluation are explored, and

the implications of working through a relational lens of cultural and political awareness discussed.

The effectiveness of aid for education development as an ongoing area of critique is the focus of Chapter 10. Highlighted is the key line of critique which analyzes the disjuncture between the managerial view of development and social change that dominates international development institutions, and the complex and dynamic real-world contexts to which aid relates. The author draws a contrast between how international development institutions predominantly view the world in terms of bounded entities that can be described, categorized, and ordered, and a relational mode of thinking, more concerned with processes and relationships, and engaged in the complexity and contingencies of practice. The interventions discussed throughout this book are drawn on in terms of the implications of a relational way of thinking and working for aid management and for aid workers.

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PART 1

Contextual and Methodological Framings

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CHAPTER 2

Education for Development in Context: Solomon Islands and Tonga

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Abstract

In this chapter, an overview of the 'education for development' context for each of the two interventions under discussion, Solomon Islands and Tonga, is provided. Although both are island archipelagos in the south-west Pacific, and both fit the definition of Small Island Developing States (SIDS), there are marked differences between them in cultural, educational, and 'development' terms. The chapter takes as a starting point the contention of some comparative educationists that education in any context cannot be understood, and interventions aimed at improvement cannot be effective, if researcher-practitioners are not informed by the development of education within the particular socio-historical and political contexts concerned. Accepted is that the interplay of culture and education is central to the operations of systems, schools and classrooms, and that social structures, values and practices shape and enable teaching and learning within a specific context. Importantly, in tracing the historical development of schooling in each context, the chapter is informed largely by writers indigenous to that country. When the discussion moves to 'education for development' in the post/neo-colonial period, a focus is the aid relationships that continue to shape education policy and practice in context, particularly those between New Zealand and the two countries concerned. Today's system in each country is summarized and the intervention for each country context introduced.

Keywords

historical – socio-political – indigenous – culture – tradition – missionary – (post/neo) colonial – aid relationships

1   Introduction

The purpose of this chapter is to inform the readership, within the limitations of the space available, of the development of education within the historical and socio-political contexts of the countries in which our two case study interventions—the Literacy and Leadership Initiative (LALI) in Tonga, and Temotu Literacy Support (TLS) in Solomon Islands—were located. As indicated in Chapter 1, from the very start of the intervention program's conceptualization, a rich understanding of context was considered essential to the design and implementation of teaching and learning initiatives in 'developing' country settings. Also accepted was the need to counter the tendency of the international development agencies to either de-historize 'development' contexts generally (Spratt, 2012) or generalize the history of diverse Pacific contexts specifically (Coxon & Munce, 2008). For those research-practice team members who, either as 'insiders' or informed 'outsiders' (see Chapter 3), already had knowledge of the historical underpinnings of the education systems in the context(s) they were engaged in, their understandings of how history shapes contemporary education politics within the wider social system, and the educational expectations and aspirations of school community members, were further refined during the life of the interventions. For the outsider team members new to the intervention contexts, efforts were taken to ensure they gained the knowledge and understanding necessary for contextually effective research-practice.

Although brief mention is made of education processes prior to European contact, the key focus is the development of formal schooling which, for each country context, has followed a sequence common in the 'developing' world. The historical processes of missionization, colonialism, and post/neo-colonialism, and the educational aims associated with each, followed the same general patterns in Tonga and Solomon Islands as elsewhere. This chapter takes the view, however, that the actual working out of these processes, and their educational consequences, depended very much on socio-political and cultural structures specific to the context in which they occurred. Also contended is that it should not be assumed that Solomon Islands and Tongan people and their existing institutions were overwhelmed by externally introduced processes–resistance, negotiation and accommodation meant that subsequent social, political and economic changes were not just imposed. This has held true in more recent decades also, with developing states such as Tonga and Solomon Islands needing to engage with the agenda of the international development agencies which fund much of the education development that takes place in their countries. The need for the communities concerned

to continually exercise their collective agency in articulating cultural continuity within change, and particularly their mediation of the global process of schooling, demonstrates well the interaction of local 'tradition' and global 'modernization' (Coxon, 2007).

Further to the sentence immediately above, we uphold the ongoing significance of the concept of 'culture' to life in Pacific Islands countries. The meanings and values which inform Solomon Islands and Tongan peoples' social relationships and everyday material practices continue to be shaped by distinct local 'traditions' and culture histories. In recognizing the interplay between culture and education as central to the operations of systems, schools and classrooms, and that socio-cultural structures, values and practices shape and enable teaching and learning, we espouse the broad definition of Stuart Hall (1986) of,

> ...'culture' as *both* the meanings and values which arise amongst distinctive social groups...on the basis of their given historical conditions and relationships, through which they 'handle' and respond to the conditions of existence; and as the lived traditions and practices through which those 'understandings' are expressed and in which they are embodied. (p. 39)

This chapter explores the dynamics of each country context (albeit in summary form) so as to give greater insight into the enablers and challenges presented within the intervention experiences of both countries as detailed in subsequent chapters. This is consistent with the aim of case study research to explore the wider context of the research focus in order to understand how things happen and why. Each country context is addressed in turn—Solomon Islands and then Tonga—beginning with a brief geographic-historic-demographic profile, followed by a history of formal schooling outlined within the wider socio-historical development of the country. In the case of Solomon Islands, specific attention is given to Temotu Province, the site of all the TLS schools. Although most of what is presented below as history comes from written accounts, also recognized is that Pacific people have their own explanations of how they came to be where they are as recorded through their oral traditions and these combined with more recent scientific sources (e.g., linguistics, archaeology) have informed the story of original human settlement in the Pacific (Coxon, 2007).

We are mindful that what is documented here barely scratches the surface of the complexities and richness of each context, historically or contemporaneously. However, as far as possible within the limitations of space and given the inherent challenges of summarizing a 'context' (see Chapter 10), the chapter

aims to familiarize the reader with elements of the 'thick' description which informed the process of 'learning *from'* the contexts in which our interventions engaged.

2   Solomon Islands

2.1   *A Brief Profile*

Solomon Islands is an archipelago consisting of 900 islands, of which less than a third are inhabited (Solomon Islands Government, 2010). The first Papuan-speaking inhabitants of these islands are believed to have arrived about 10,000 years ago from South-East Asia, with further migrations of Austronesian language speakers about 4000 years ago (Kabutaulaka, 1998, p. 11). The first known European arrival was in 1567 when Spanish explorer Mendana 'discovered' and named the archipelago Solomon Islands. Solomon Islands' total land area of 28,369 square kilometers within approximately 1.35 million square kilometers of ocean. From north to south the islands cover 900 kilometers and from east to west over 1800, with about 87% of the land in customary ownership through which rights to land are vested in descent groups (Maebuta, 2011, p. 83).

According to current estimates, the fast-growing population of Solomon Islands stands at just over 680,000 (compared to 516,000 in 2009). Approximately 12% of the total population live in the capital city of Honiara located on the large island of Guadalcanal. Honiara, which had been an important base for U.S. servicemen during World War Two (WW2), became the capital after the previous capital, Tulagi, was destroyed by Japanese forces. Solomon Islands is relatively rich in natural resources such as timber, fisheries and minerals compared to other Pacific Islands countries. Approximately 80% of the population continue to live on customary land in rural areas, largely in communities of less than 200 people, relying on subsistence farming and fishing with limited employment or cash-generating opportunities (Solomon Islands Government, 2010). Infrastructure, particularly transport and communication, is poor. The population is highly scattered and relatively isolated with only 17 people per square kilometer (ibid.). These features impact substantially on the delivery of social services including education. Solomon Islands ranks fourth in the world for vulnerability to natural disaster and climate change is a major impediment to the sustainable development and wellbeing of Solomon Islands communities.

Politically, Solomon Islands has a parliamentary government system shaped by the British colonial administration it was ruled under from 1893 until

independence in 1978. At independence, a national government was established as the supreme structure able to devolve administrative functions to the nine provinces into which the country was divided. Despite efforts to expand government services in the decades following independence, the Honiara-centered state continues to have minimal influence beyond its boundaries, resulting in recurring challenges to government legitimacy and national unity (Maebuta, 2011, p. 91). The disconnect between the introduced 'Westminster' government system, and existing local governance systems underlies these challenges (Kabutaukala, 2008). A more fundamental and authentically Solomon Islands form of political and social organization which developed in pre-colonial times and maintains an extremely strong presence in contemporary politics, is the kinship based 'big man system'. The 'big man' is a meritocratic and highly personalized system by which leadership is ascribed, frequently through community consensus and based on criteria such as a proven ability to advance community welfare and lead collective enterprises, leadership in settling tribal disputes, and the accumulation and redistribution of material wealth (Maebuta, 2011). A feature of the 'big man' system as it developed, is that across the archipelago there was no one leader nor one site of power, and neither did the system reinforce a sense of national unity; rather, these "shifting clusters of significance, not hierarchies, characterized Solomon Islands' political and social geography" (Bennett, 2002, p. 3, cited in Spratt, 2012, p. 7).

Although 95% of Solomon Islands' inhabitants are Melanesian, there is a vast diversity of cultures and languages. Seventy-one indigenous languages are still spoken, English is the official language of education, government administration and media, and Pijin (Solomon Islands pidgin) is the lingua franca (see Chapter 6 for elaboration). With the majority of the population Christian, the Church plays a major role within communities and in the provision of education. However, culture and tradition, referred to as *kastom,* continues to play a central role in the lives of most Solomon Islanders (Maebuta, 2011; Spratt, 2012), and is defined in contrast to modern institutions such as the state, church and schools which are seen as "belonging to the whiteman way of life" (Kabutaulaka, 1998, p. 18). Also central to contemporary social relationships is *wantok* (one-talk)*,* a word developed to express connection in contexts where laborers from various Melanesian language groups worked together on plantations. Overtime *wantok* has become, "a method for creating society in urban locations as well as a reflection of the reality of village existence" (Sanga, Reynolds, Paulsen, Spratt, & Maneipuri, 2018, p. 6) so that the relationality that underpinned family and village-based life has been "purposefully transformed" (Repič, 2011, cited in ibid.); in such contexts *wantok* implies the need

for co-operation, allegiance and reciprocal relationships amongst those who have a sense of shared identity (Spratt, 2012, p. 5).

Following independence, economic growth was limited and from the late 1980s the country experienced a period of chronic political instability, with highly uneven development across the nation, leading to an essentially bankrupt and barely functioning government by the late 1990s. These factors contributed to a period of civil conflict from 1998–2003, locally known as the Tensions. Following extensive regional consultation, the intervention of an Australian-led regional assistance mission to Solomon Islands (RAMSI) worked in partnership with the Solomon Islands Government to restore peace, reestablish law and order, and rebuild the machinery of national government (Kabutaulaka, 2004).

Since the end of the Tensions national economic growth has been strong; this has largely been fueled by unsustainable natural resource extraction (particularly logging), the revenue from which has not been widely distributed and the environmental and social costs of which have been high (World Bank, 2017). Therefore, in conjunction with weak state institutions, the national economy of Solomon Islands is considered fragile (ibid.). Human development indicators for Solomon Islands are low, both internationally and for the Pacific region. On the 2007 Human Development Index (HDI) Solomon Islands rated 129th of 177 countries and in 2017 was 152nd of 189 countries; for each of these measures Solomon Islands held the second lowest ranking for the Pacific Islands region.

Education for development is seen as a key component of Solomon Islands' broader economic and social development strategy and is characterized as in urgent need of improvement. Common indicators of formal education in Solomon Islands have improved significantly since the end of the civil conflict in 2003, particularly in terms of school enrolment. However, indicators of the quality of the formal education system are relatively poor, and access to secondary and post-secondary education remains very low. As of 2017, the net enrolment rate for primary school was 92% with near gender parity but the survival rate[1] for primary is only 54%. Net enrolment at junior secondary (Year 7–9) is 38% and senior secondary is just 30%, with minimal difference between boys and girls. There are high rates of over-age students and high rates of repetition particularly at primary level (MEHRD, 2017).

2.2 *Brief History of Formal Schooling in Solomon Islands*
2.2.1   Missionary and Colonial Schools
Formal schooling in the Solomon Islands was first established by the Anglican Church's Melanesian Mission in the late 19th century. By the early 20th century,

boys' boarding schools had been established on a number of islands and the first boarding school for girls began in 1917. The Melanesian Mission and other Christian churches also operated many village schools (Boutilier, 1974, p. 39).

Because of the colonial administration's need to involve Solomon Islanders in lower level public service and commercial employment, thus the need to expand accessibility to and raise the level of education, from 1926 grants to foster mission education programs were provided. Post WW2, the British Administration made some attempts to address nearly 50 years of educational neglect; in 1946 an Education Department was established which by 1952 had set up five elementary schools on Malaita employing local teachers, including one which by 1959, as King George VI, had become a secondary boarding school (Kenilorea, 2008, pp. 47–48). In 1966, the school was moved to Honiara as the first National Secondary School (NSS) and the next year, although only five of the 159 students who relocated to Honiara were female, it became fully co-educational. Although a small number of government primary schools were opened in other parts of the country during the 1960s and '70s, by the time of Independence in 1978, the education system inherited from the British colonial administration by the new Solomon Islands Government comprised a rather ad hoc collection of differing school types, with fragmented management systems (Pederson & Wasuka, 2010). This system was enshrined in the 1978 Education Act.

2.2.2 Post-Independence Schooling

There has been considerable growth in the formal education system in the decades since independence. As well as many more primary schools across the country and additional NSSs, Provincial Secondary Schools (PSS) were introduced in the 1980s under a World Bank supported initiative, and in the 1990s community high schools (CHS) evolved, driven largely by community demand and funding (Pollard, 2005).

In 2017 there were approximately 216,000 students enrolled across all stages of the school system, just under 1,000 schools and nearly 9,000 teachers in total (MERHD, 2017). The education system is managed through the Ministry of Education and Human Resource Development (MEHRD) based in Honiara, Provincial Education Authorities (PEAs) based in each Provincial Government, and private (often church-based) Education Authorities (EAs). MEHRD is the largest government ministry in Solomon Islands and currently receives a little over 30% of recurrent budget from the government. The churches continue to play a significant role in education service delivery at all levels, with approximately 25% of primary and secondary schools being church-owned and managed.

The rapidly expanded system has created both considerable management demands and rising expectations of education's role in the 'development' of the country (Pederson & Wasuka, 2010). Educational aspirations have grown greatly since independence, and increasingly schooling is being seen as something that should be accessible for all (Pollard, 2005). However, symptomatic of the weak relationship between the citizens of Solomon Islands and their national government, there is often a disconnect between schools and their communities, in part as a result of the disconnect between schools and indigenous knowledge systems and languages (Gegeo & Watson-Gegeo, 2002).

The education sector receives significant support from a range of international aid donors. Following the Tensions, a sector-wide approach (SWAp) with a focus on basic education (Years 1–9) was established between Solomon Islands Government, the European Union and the New Zealand Government. As the first SWAp in the region, and the first time sector budget support had been provided by donors to Solomon Islands Government, this was a significant initiative and testament to the strong leadership shown by the Minister and senior staff in the Ministry at the time (Pederson & Coxon, 2009). The SWAp, and particularly the efforts made to strengthen MEHRD leadership and donor coordination, has been credited with the significant improvements of the last 15 years (Department of Foreign Affairs and Trade [DFAT], 2018). Although New Zealand and Australia are currently the largest donors, more than 20 other donor partners are actively engaged in the sector (MERHD, 2018). Because donor funding pays for the bulk of MEHRD's development and reform activities and is accompanied by significant amounts of technical assistance and engagement in policy dialogue, donors have a notable level of influence in the sector (ibid.).

2.3   *Temotu Province*[2]

In terms of proximity to the national capital of Honiara, Temotu Province, located at the most easterly point of the country is the most remote of Solomon Islands' nine provinces. The population of Temotu is close to 25,000 and the province comprises 12 islands across an area of 895 square kilometers. Temotu is very vulnerable to natural disasters such as cyclones, coastal flooding, earthquakes, tsunamis and volcanic eruptions (Maebuta, 2011, p. 115). Nendo (also known as Santa Cruz) is the largest island in the province, and the location of the province's capital, Lata, where the Provincial Government's headquarters, including the Provincial Education Authority (PEA) office, are located. In Nendo and its neighboring islands, the 'Big Man' system of leadership, with its traditional role of overseer of cultural norms and overall well-being of the community, is still in place.

According to oral history passed on through generations, Temotu Nendo descendants originated from two tribes called *noubu* and *noubebla*. *Nou* means tribe while *bu* and *bebla* are names of fish. It is believed that when the *bu* and *bebla* were washed ashore they were transformed into human beings. The *bu* became a man and the *bebla* turned into a woman. They married and their children populated the island. Traditional stories and legends such as this provide the foundation for *kastom* practices, values, and beliefs which ensure the island culture is very much protective of relationships between the peoples of the island, and between them and the environment.

Nendo's traditional way of life was disrupted in 1595 with the arrival of a fleet of four Spanish ships carrying about 400 people intent on setting up a colony. The Spanish King's interest in colonizing Solomon Islands was because of perceived economic potential and its strategic location between other Spanish colonies in the Philippines and South America (Allen & Green, 1972). The leader and purported governor of the colony was the explorer Mendana, who 30 years previously, had been the first European to 'discover' other parts of Solomon Islands which he had named at that time. On arriving at Nendo, which he named Santa Cruz, the ships entered what became known as Graciosa Bay which is where they settled. However, it was not long before conflict between Mendana's soldiers and the indigenous people led to many deaths on both sides. Many more of the Spaniards, including Mendana himself, died from tropical illnesses and are buried in unmarked graves near their Graciosa Bay settlement. The survivors abandoned the settlement in November 1596 (Maebuta, 2011, p. 114).

The next notable 'outsider' arrival was that of the Anglican church missionaries which led to the subsequent evangelization of Temotu. Between 1856 and 1871, the first Anglican Bishop of Melanesia, John Patteson, visited a number of times aboard the mission vessel 'Southern Cross' leading to Anglican missionaries establishing a mission station in Nendo. It is reported that schooling began there soon after.

When the British colonial administration extended their rule over Solomon Islands in 1898, the Temotu islands became one of the 12 administrative districts making up the Protectorate. However, because of ongoing resistance to colonial rule, there was very little 'official' presence until the early 1920s when the colonial government, with the support of an armed escort, began to survey the islands. In 1925 a permanent government presence including a District Officer was established after which it took about five years to impose colonial control. During WW2 the administration's representatives were withdrawn from Temotu; they returned post-war to continue their low-level presence until independence in 1978 (ibid.).

The cultural practice of living in extended families, clans, and tribes continues to be a significant feature of social life in Temotu. It gives people a sense of identity and unity and has a significant bearing on issues such as land and ownership of other resources. It is the entire extended family, line, clan and/or tribe and not the individual who owns the resources. As with many Melanesian societies, in Nendo the religious and traditional significance of land makes it their most highly valued heritage and resource.

The provincial government depends on the National Government Grant to deliver basic services in the province but, given the extreme geographic isolation and additional cost of goods and services this imposes, most rural people are unable to afford to pay the cost of basic necessities not met by the government grant. Because of their livelihood struggles some land-owning groups have agreed to foreign-owned companies undertaking logging or mining on their land, which has led to tribal conflicts. Churches continue to play a very important role in the lives of the people of Nendo. They help give people a sense of belonging and are central to nurturing positive attitudes and in reconciling warring parties so that peaceful coexistence is maintained between the different cultural groups within the island.

Today, most of the province's population live on Nendo, the majority of whom are Melanesian and indigenous to Nendo. The most common language spoken on Nendo is Natgu, with Nalrgo, Äiwoo and Taumako-Vaeakau being other vernaculars in use, as well as pijin. The 16 schools included in the Temotu Literacy Support program were all located on Nendo and included teachers and students fluent in all these languages, many of them in more than one (see Chapter 6).

2.4   *Brief History of Formal Schooling in Temotu*

2.4.1   Missionary and Colonial Schools

As reported above, after Anglican missionaries were successful in establishing a mission station in Santa Cruz/Nendo mission schools were also developed, but because of the lack of documentation about that and subsequent developments, one of the authors of this chapter engaged in a *tok stori* with a Nendo elder, renowned educator Mr. Ben Menivi, who shared his knowledge of the development of schooling in Temotu. *Tok stori* is a relational mode of communication, widely practiced in a variety of Melanesian contexts (see Chapter 9). Sanga et al. (2018, p. 5) argue that *tok stori* offers a counterpoint to decontextualized and dehumanized knowledge production; that *tok stori* "offers opportunities for researchers and others to follow a relational path in their investigations, one which recognizes the connectedness of humanity…[and]

is likely to yield learning which serves the interests of communities precisely because the methodology is ontological".

According to Mr. Menivi, schooling in Temotu, and more specifically on Nendo was developed from a humble beginning at mission schools. From his recollection of what he had been told, he reported that in the mid-1800s a Mr. Forest from England was sent by the Church to establish a school on Temotu Neo Island. It was around that era that the Bishop of New Zealand (whose diocese included Melanesia), George Selwyn, saw the need to educate girls, and a local girl by the name of Monica Ipwir was sent to Norfolk Island to be trained as a teacher. When Monica returned, she started the first co-educational school at Nelua on the north coast of Nendo. Mr. Forest was then sent to another part of Temotu, to start a school there. This initiative failed, however, and many of the people who had become Christian went back to paganism. Christianity was later re-established during and following Bishop John Patteson's mission in the 1870s and '80s, which also saw the reestablishment and expansion of mission schools.

One of the schools that was established after the Patteson era was called Bo'o Primary. Mr. Menevi recalls that after the Second World War a school by that name was located at the northern end of Graciosa Bay. It was a boys' only school with two local teachers by the names of Mr. Simon Meabir and John Mark Niada. Later the school was relocated to Mnaim, but this was short-lived as Mr. Menevi held a meeting in 1961 in his community which decided to move the school to Naban where Mona Community High School is today. The move onto Menivi's own land was at his initiative because he saw the need to bring schools closer to where people were, thus enhancing their children's access to schooling.

Another, historical development was that of the establishment of Luesalemba Senior Primary school. This school was established in the early 1960s under the headship of Mr. Shadrick Sade from Nagu village on Nendo. One of the first students of the school was Dr Joanna Daiwo, the first Solomon Islands female to hold a Doctor of Philosophy (PhD). She is currently a Senior Lecturer in Early Childhood Education at the Solomon Islands National University.

2.4.2   Post-Independence Schooling

According to Menivi, all the schools of Temotu were operating under the Anglican Church until 1963 when they were handed over to the Government. A key development after the Government's taking ownership was in the mid-1970s when Luesalemba Senior Primary became the new Temotu Secondary School, providing a two-year secondary education program. In 1979 the school

was upgraded to a PSS offering three years of secondary education. The author of this section of the chapter is a product of the Temotu PSS, and now holds a PhD and a senior position at Solomon Islands National University.

Today a total of approximately 7,500 young people of Temotu Province are served by 27 primary schools, 14 Community High Schools and one PSS. The Net Enrolment Rate for primary is 99% for both male and female students but this falls to 30% for junior secondary level and 22% at senior secondary (MEHRD, 2017). Of 272 primary classroom teachers, only 169 (62%) are certificated; for secondary teachers 70.3% (90 out of 128) are certificated (MEHRD, 2018).

2.5   *Temotu Literacy Support* (*TLS*)

Agreement on where the early-grade (Year 1–3) literacy and leadership intervention should be located was determined through a process of consultation between MEHRD and the University of South Pacific and University of Auckland team that had won the contract for the program. The Permanent Secretary for Education's proposal that Temotu Province was a suitable location was based on a number of factors: that the participant schools included in the intervention design should be based in only one province; that the schools should be reasonably accessible from the Provincial center and geographically suitable to the proposed 'cluster' intervention approach; that MEHRD data demonstrate a clear need in those schools for the literacy improvement focus of the intervention; that there be no other early-grade literacy initiatives operating in the province; and that delivery of an aid-funded initiative to Temotu primary schools would redress the relative neglect of remote provinces in receiving such assistance. Of particular interest was the intervention design's inclusion of PEA officers and school principals as leaders of literacy improvement, and the design-based research approach for building a strong evidence base as for what works to increase literacy achievement in Solomon Islands schools (see Chapter 4).

What was required before Temotu could be confirmed as the intervention location, however, was agreement from the Provincial Government and the Provincial Education Authority. A visit involving two of the authors of this chapter was undertaken to Temotu where an extremely well-attended meeting with a high level of engagement by the Provincial Minister of Education and key members from Provincial Government and the PEA resulted in a unanimous decision in favor of proceeding with the proposed Temotu Literacy Support intervention. Fifteen Nendo/Santa Cruz schools were identified, one in Lata township, ten being accessible by road from Lata, and five being accessible only by boat. Issues identified through this key meeting, further consultations

and school visits, included: the understaffing of the PEA office; the complex language context and potential for vernacular literacy (see Chapter 6); the fact that most Year 1–3 teachers are untrained; the high rate of teacher and student absenteeism; meagre school resourcing; and low community participation in schools.

Despite these challenges, however, the very positive response to what was being proposed from all groups met—provincial government officials, school principals, teachers, students, community members—indicated the scope for positive change and the potential for TLS to make a difference.

3   Tonga

3.1   *A Brief Profile*

The small Polynesian state of Tonga is an archipelago of 169 islands, 36 of them inhabited, comprising a total land area of approximately 450 square kilometers within 50,000 square kilometers of ocean. The islands are divided into three main groups stretching along 800 kilometers from north-south: Vava'u in the north, Ha'apai in the center, and Tongatapu and 'Eua in the south. About 70% of the total population of approximately 105,000 reside on the main island of Tongatapu, with about half that number living in or nearby the capital of Nuku'alofa (Johansson-Fua, 2015).

The vast majority (about 95%) of the population are indigenous Tongans and complex traditional social stratifications, in which status and rank play powerful roles in formal and personal relationships, are still adhered to. In the past 30–40 years, however, a secondary classification based on relative wealth, education and politics has given rise to a middle-class elite which cuts across the traditional ranking system (ibid., p. 298). The Christian faith continues to feature strongly in everyday life and Tongan is the official language of the country, along with English. This cultural and linguistic homogeneity, plus the long-standing existence of a 'strong' centralized state have had significant educational effects (Fusitu'a & Coxon, 1998).

Politically, the Kingdom of Tonga occupies a unique position among Pacific countries having had continuous monarchical rule for over 1000 years and being the only Pacific Islands state to have avoided direct colonization (Coxon, 1988). Under today's constitutional monarchy the government is headed by a Prime Minister appointed by the King according to Parliament's recommendation. Tonga is governed by a constitution which has been in place since 1875, making it the third oldest constitution in the world (Johansson-Fua, 2015, p. 297).

In the mid-nineteenth century, Nuku'alofa developed as the seat of government, a trade center and the main port. Since then, it has continued as home to the royal palace, the parliament and government departments, embassies and high commissions, the main hospital, professional offices, retail stores, a large produce market, hotel and restaurants, with some small industry on the outskirts of town. While Nuku'alofa and the smaller service centers located in Vava'u and Ha'apai generate much of the country's economic activity, the economy is largely dependent on primary products. Tonga imports over 50% of goods, with export consisting mainly of agricultural products, fisheries and traditional handicrafts. Local manufacturing is limited and despite heavy investment in tourism, it has not taken off to the extent it has in neighboring countries.

The average Tongan continues to live a semi-subsistence life-style, living off the land and from the ocean although impacts of climate change, already evident in certain small low-lying islands in Ha`apai and Vava`u, have affected crops and catch from the ocean (Johansson-Fua, 2015). The past two decades have been characterized by a slow-down in domestic production, and this combined with the need for all Tongans to engage in the cash economy has led to increased dependence on continued high rates of emigration and the remittances provided by Tongans living abroad. Furthermore, international aid has contributed a much higher proportion of the money required to provide basic social services such as education, than was previously the case (ibid.).

Tongans are deservedly proud of their educational history. Although the formal schooling introduced by missionaries in the early nineteenth century was established relatively recently compared to some parts of the world, the Tongan government has for many decades provided close to universal access to a nation-wide system of government primary schools staffed by locally trained teachers and recording the highest rates of literacy and primary school completion in the Pacific Islands region. A comparatively high rate of transition to secondary education (over 90%), has also long characterized Tongan education (Coxon, Tolley, Johansson-Fua, & Nabobo-Baba, 2011). However, in the past decade the Tongan education system has suffered setbacks due to political and economic challenges. Several events, including a civil strike in 2005 that resulted in government raising the salary of civil servants against a weak economy; politically inspired rioting in 2006 that destroyed a significant number of businesses in the capital of Nuku`alofa; and reduction in remittances from overseas Tongans due to the global financial crisis, have all contributed to a struggling economy.

Growing concerns about the current system's ability to maintain and enhance the quality and equity of primary education and to provide the

pathways through which secondary school leavers can either find a job or earn their own livelihood, are widespread amongst the Tongan population and the 'development partners' active in education in Tonga; at the time of writing these included New Zealand, Australia, the World Bank, and UNICEF. The political and economic instabilities of recent years are also perceived to have had a marked effect on the delivery of government services as reflected, for example, in the Human Development Index. In 2007, Tonga was placed 55th out of 177 countries and first for the Pacific Islands region; in 2018 Tonga was ranked 98th out of 189, and second in the region. Despite these challenges, however, Tonga continues to demonstrate a high level of commitment to its formal education system, as it has done for over 150 years (Auckland Uniservices Ltd [AUL], 2019).

3.2   *A Brief History of Formal Education in Tonga*

The development of formal education in Tonga cannot be considered separately from the *'ulungaanga faka-Tonga*—Tongan culture, way-of-life—and the particular socio-historical and political contexts in which it developed (Fusitu'a & Coxon, 1998). The following account seeks to demonstrate how 'traditional' structures have shaped and, to an extent, indigenized the introduction of 'modern' institutions such as the nation-state and education.

3.2.1   Pre-European Contact

Prior to the arrival of the missionaries who introduced Christianity and schooling in the 1820s, the highly organized socio-political system was closely interwoven with indigenous knowledge, both religious and secular (Lātūkefu, 1974). According to archaeological and linguistic sources, Tonga was settled about 3200 years ago and was the first country in what became known as Polynesia to be so. As asserted by renowned Tongan educationist Konai Helu Thaman, "For over 3000 years, education prepared Tongans for their societal roles.... Where learning was organized...the values taught did not conflict with those of the wider society; in fact they reflected that nature of that society". She continues, "This education was mainly effected through...myths, legends, poetry, songs and some rituals..." (Helu Thaman, 1999, pp. 71–72).

The generally accepted version of Tongan political history maintains that from about 950 A.D. until the time of European contact, Tonga was ruled by three connected and at times overlapping dynasties. The pre-eminent of these, the *Tu'i Tonga*, was both spiritual and secular leader; the first *Tu'i Tonga*, 'Aho'eitu, was believed to be the son of the god Tangaloa and a Tongan woman, so was both divine and human (Coxon, 1988). Late in the fifteenth century, a second dynasty, Tu'i Ha'atakalaua, was established as *Hau,* secular ruler;

the *Tu'i Tonga* then became *'eiki Toputapu*, sacred and highest-ranking ruler (Lātūkefu, 1974, p. 2). The first incumbent of the third dynasty, Tu'i Kanokupolu, was appointed early in the seventeenth century. He began the process of taking over the privileges and responsibilities of the Hau to the extent that by the end of the eighteenth century the Tu'i Ha'atakalaua had been absorbed into the Tu'i Kanokupolu, from which today's royal family is descended (Hingano, 1987, p. 7).

Throughout these centuries the *hou'eiki* (chiefs) exercised absolute power over their *tu'a*—commoners who lived on their estates; this period is considered to have been generally stable, however, with a chief/commoner relationship characterized by reciprocity (Lātūkefu, 1974, p. 9). Such observations were recorded at the time of European 'discovery' of Tonga–by Dutch explorers Shouten and Le Maire in 1616 and Tasman in 1645–followed by Captain James Cook's three visits between 1773 and 1777. The journals of Cook and those who accompanied him excited great interest among missionary societies in Europe leading to the arrival of the London Missionary Society in 1797, the first of a number of attempts to missionize Tonga over the next 30 years, prevented mainly because of the civil wars that had broken out (Coxon, 1988, p. 63).

3.2.2   Missionary Schooling and the Rise of Tāufa'āhau

In the late 1820s, although they continued to be opposed by some chiefs, traditional priests and other Europeans already in Tonga (e.g., whalers, traders and beachcombers) Wesleyan missionaries finally succeeded in establishing themselves on Tongatapu (ibid.). Their insecure foothold encouraged them to seek a champion among the Tongan chiefs and fortuitously for them there had emerged from the political turmoil an ambitious and politically astute member of the Tu'i Kanokupolu clan, Tāufa'āhau, who had already asserted his rule over Ha'apai and Vava'u and was keen to extend it further. In 1826 Tāufa'āhau defeated the incumbent Tu'i Tonga in battle and soon after he and the missionaries recognized their mutual interests in defeating political rivals and establishing Christianity. In 1831 he was baptized into the Wesleyan church and by 1845 he had become Tu'i Kanokupolu and the sole ruler of all Tonga. Calling himself King George Tupou 1, he founded the Tupou dynasty which rules the Kingdom of Tonga today (Helu, 1981).

For the 30 years following his accession, Tāufa'āhau, with the help of Wesleyan missionaries, worked to secure Tupou dynastic rule and international recognition of Tonga as a sovereign state. European concepts of law, *lao,* and civil government, *pule'anga* (Rogers, 1975) were adapted to the Tongan context and, combined with Christian principles and monarchical authority, these laid the groundwork of an ideology which became institutionalized fully in

the 1875 constitution under a constitutional monarchy with supreme power divided between executive, legislative assembly and judiciary. The western powers were duly impressed and within a short time recognized Tonga as an independent nation (Coxon, 1988, p. 70).

The political rise of Tāufaʻāhau was accompanied by the establishment and expansion of formal schooling. His conversion to Christianity led to the consolidation of missionary endeavors in opening schools focused on reading, writing and religion and constructing a Tongan orthography. The arrival of a printing press in 1831 led to many publications in the Tongan language which were eagerly read by locals. Christianity and the schooling that went with it spread further and the need for trained teachers resulted in a rudimentary teachers' training institution being established in 1841 with the support of Tāufaʻāhau (Lātūkefu, 1974, p. 75). The improved education of teachers led to more efficient teaching and additional subjects such as maths, history, geography being taught (Kavaliku, 1966).

3.2.3 From Church to State Control of Schooling

The link between knowledge and power perceived by Tāufaʻāhau enabled his becoming King George Tupou 1. In laying the foundations of a 'modern' independent state he recognized the need for educated people to run the state (Fusituʻa & Coxon, 1998). Combined with his desire to pre-empt the intentions of the colonial powers, in 1862 this resulted in Tonga becoming one of the first countries in the world to declare education compulsory. That the state was able to make schooling compulsory even though the church, not the state, owned and controlled the schools, indicated the unity between them (Kavaliku, 1966, p. 129). In 1866, the provision of a higher level of education became available when, at the King's request, a secondary school, Tupou College, was established by Wesleyan missionary and classical scholar, Dr Moulton. The aim was to provide an academic education comparable to that available elsewhere in the world. The first male-only enrolment included the King's grandson, sons of chiefs and some commoners who had passed an entrance exam. In 1869, enrolment was opened to young women (ibid., p. 118).

The Education Act of 1882 signalled an explicit shift from church to state control of education with all existing primary schools becoming government schools and the establishment of the first government (boys only) secondary school, Tonga College, with the prime objective of the provision of state officials. The King's commitment to the new educational forms and practices was because he recognised that in order to assert Tonga's sovereignty in the face of the encroachment of westernization it was necessary to have control of western knowledge; not as a substitute for Tongan knowledge but as well as Tongan

knowledge (Fusitu'a & Coxon, 1992). The literature on the historical development of formal schooling in Tonga indicates a strong desire within wider Tongan society for the credentials offered by 'western' education (see for example, Kavaliku 1966; Lātūkefu, 1974; Helu, 1981) while still upholding Tongan knowledge and ways of knowing.

3.2.4   Into the 20th Century

During the first decades of the twentieth century Tonga's school system came under the influence of New Zealand officials,[3] and a more typically 'colonial' education policy was introduced with a focus on what the authorities perceived to be more relevant to the "education of native races" (Kavaliku, 1966, p. 151). In contrast with the 'academic' notion of education introduced by the first King under the influence of Moulton, the type of schooling that could best meet the 'needs of society' was considered to be that in which practical subjects, seen as most useful in preparing children for their existing environment, prevailed (Helu, 1981). This was consistent with wider political and social changes of the time under the reign of Queen Salote, whose emphasis on preserving Tongan culture and strengthening the existing social hierarchy led to some withdrawal from external forces and less focus on the outside world.

3.2.5   Post World War Two

The 1943 appointment of the Crown Prince (who ruled as King George Tāufa'āhau Tupou IV from 1966 to 2006) as Minister of Education, on his return from Sydney University, marked "a new spirit of education" (Kavaliku, 1966, p. 153) with a renewed emphasis on the importance of an internationally recognized standard of education. In 1947 he established Tonga High School as the preeminent coeducational secondary school providing the most academically able students in the Kingdom with an education on a par with that offered in New Zealand; many New Zealand teachers were employed to deliver New Zealand's curriculum and examinations. A scholarship system for Tonga High graduates to pursue higher secondary and tertiary education in New Zealand was also established. With King Tupou IV's 1966 accession to the throne and the establishment of policies aimed at economic expansion and modernization, the upgrading and expansion of education became a priority, requiring not only a higher overall standard of education but also the education of many more students at higher secondary and tertiary levels within Tonga and overseas (Fusitu'a & Coxon, p. 3). Also required was increased centralization of Ministry of Education control over what was offered in both primary and secondary schools; the 1974 Education Act laid down a national syllabus to which all schools had to adhere.

During subsequent decades, while the government continued to own and manage almost all primary schools, much of the expansion and upgrading of secondary education was through the churches. Education was seen as a cornerstone of national development and a key priority for the national budget, particularly for buildings, teacher training and curriculum development. The succession of five-year development plans that Tonga undertook in the final decades of the 20th century, with support from international aid donors and overseas advisers, all highlighted investment in education as crucial to the country's economic and social development (Helu, 1999). However, despite its early and continuing investment in education, 'development' in Tonga was unable to keep pace with the needs of an increasing population. This resulted in high levels of emigration, an increasing dependency on aid and remittances, and growing youth unemployment (Tolley & Coxon, 2015, p. 184).

3.2.6   Into the 21st Century

Early in the new millenium, the government of Tonga recognized the need to address social inequalities and improve living standards for all Tongans. This included the need to align the education sector with the demands of the 21st century. Consistent with the global education agenda and Tonga's commitment to the MDGs, improving the quality of universal basic education was a key strategy for this, as promoted by the 15 year education policy framework (2004–2019), the development of which was led by international consultants. Also indicated was a move towards a sector-wide approach (SWAp). In 2005 Tonga became the second Pacific Islands state to introduce a SWAp for education aid delivery, with the World Bank and New Zealand as the main 'development partners'. Its aims in doing do were to coordinate and align all official aid to education in accord with the policy framework and to harmonize government and non-government systems (Tolley & Coxon, 2015, p. 185). Although over its two five-year periods the SWAp was reasonably successful in achieving the latter, it was less so with the former. Perceived micro-management by the development partners, and their failure to recognize and build on Tonga's historically developed educational strengths and local educators strong sense of ownership of their system, contributed to "a sense of imposition" rather than the locally led partnership arrangement envisaged by a SWAp (ibid., p. 187).

3.3   *Today's System of Schooling*

Today education in Tonga is free and compulsory for all young people from the ages of six to 14 years old. Although provision of education at primary and secondary levels is shared with church and other non-government groups, the Tonga Ministry of Education and Training (MET) has legal oversight of all

systems and schools in the country, and maintains a centrally controlled management structure to which all schools must adhere. Government provides about 90% of the primary schools, while non-government education systems own and operate 40 of the 55 secondary schools (Johansson-Fua, 2015, p. 298).

Primary education in Tonga is from Year 1 to Year 6 with the usual school entry age of six years old. The government's long-standing policy of ensuring that no child shall have to walk more than two miles to a primary school has resulted in an access rate to primary education of 100%. (Johansson-Fua, 2015). About 85% of the total primary school enrolment of over 17,000 students (MET, 2015) attend one of the 105 government primary schools spread across the archipelago with a school in almost every village and on every island, thus a high number of very small schools. The remaining 15% of students attend private or church schools. Schools are staffed by close to 800 teachers, over 70% of whom are female, in classrooms with limited teaching and learning resources (ibid.; Johansson-Fua, 2015). The medium of instruction for the first three years is Tongan, with English being gradually introduced through the subsequent three years; the aim is for primary school leavers to be reasonably bilingual. Since 2012 a new outcomes-based curriculum focused on strengthening Tongan culture, literacy and language has been central to teaching and learning in all primary schools (Johansson-Fua, 2015, p. 304). At the end of Year 6, all students sit the national secondary school entrance examination (SEE) in Mathematics, Science, Tongan Language and English, with the total marks for each child determining entry to the secondary school they hope to enter (ibid., p. 299). All government operated primary schools are fee-free and the government also provides grants for maintenance of facilities, equipment and other school supplies. However, each school community plays a significant role in the development of their village schools, providing financial aid for renovations, building of fences and supplying additional teaching materials for the children (ibid., p. 301).

Secondary education in Tonga is from Year 7 to Year 13. In 2014 there were a total of 14,961 students enrolled in secondary school taught by a total of 1116 teachers. Church systems enroll approximately 70% of the secondary student population (MET, 2015). Three national external exams are included in the secondary school program in Years 11, 12, and 13. Achievement in the first two of these allows students to enter post-secondary vocational training courses while the Year 13 examination determines entry to university and other tertiary institutes in Tonga or overseas (Johansson-Fua, 2015).

The main teacher education provider, the Tonga Institute of Education, developed from the government owned teacher's training college which began

training Tonga's teachers in the 1940s. The Institute offers a Diploma in Education for both primary and secondary teaching, a Certificate in Teaching for untrained teachers and Post-graduate Certificate in Teaching for teachers with a degree but no teaching qualification. The fewer than 10% of untrained teachers are mainly working in non-government systems. The University of the South Pacific's Tonga Campus offers teacher education programs ranging from the Diploma in Education to Master of Education and Master of Arts in Education (ibid.).

As noted by former Minister of Education, Dr 'Ana Taufe'ulungaki (latterly, LALI senior literacy and language advisor), because of the shared belief in education as an instrument for development, the government of and communities within Tonga have invested substantial resources in the provision and maintenance of school systems, "However, quality education in terms of appropriate and beneficial outcomes, both within the formal school contexts and in larger society, has continued to be elusive" (2005, p. 46). Identified by Dr Taufe'ulungaki as a "critical issue" was primary school underachievement in basic literacy. This concern has been reiterated many times since, including in the Tonga Strategic Development Framework (TSDFII) for 2015–2025. TSDFII's commitment to inclusive, sustainable and empowering human development highlighted a strong foundation in literacy as foundational to education for development in Tonga (AUL, 2019).

3.4 *The Literacy and Leadership Initiative (LALI)*

LALI was developed in response to a perceived weakening of literacy teaching and learning in primary schools, which was partly attributed to inadequate school leadership. Although used here as an acronym, *lali* is a Polynesian word referring to a slit drum of a type still used in Tonga as a way of calling people together for collective action. The decision to abandon the generic name for the intervention program, as attributed by the New Zealand aid program which was funding it, and come up with a meaningful Tongan-specific name was made at the initial meeting called to discuss the intervention. The meeting was attended by a large and enthusiastic number of key stakeholders from across the ministry and non-government systems. Members of the University of South Pacific and University of Auckland teams also participated and received clear messages about expectations for the intervention's focus and approach. With an overarching goal of improved literacy outcomes for primary students, the key features of LALI were agreed as: a school and classroom-based intervention working with principals and teachers to build understanding of existing strengths and challenges; an integrated literacy and language focus

including the home/community role in language development; support for school principals to become 'literacy leaders'; and the development of both monolingual (Tongan) and bilingual (Tongan/English) teaching and learning resources.

Agreement was also reached on the 15 schools to be included. Criteria for their selection included: outer island schools as far as logistically possible; geographical suitability for a 'cluster' approach; the need to avoid schools already involved in aid-funded interventions. Three clusters were identified comprising all six schools on the southern island of 'Eua, five schools on the northern island of Vava'u, and four schools in close proximity to the USP campus on Tongatapu. Although initially it was proposed that, as for the other countries involved, the focus would be on Years 1–3 students, a request from the then Minister of Education that LALI include students from Years 1–6 was accepted, as was the Minister's suggestion that a whole school improvement approach be adopted. Thus, the scope and overall approach of LALI was tailored to meet Tongan priorities.

4   Concluding Comment

As stated in the introduction, this chapter has aimed to provide an overview of the 'education for development' context for each of our intervention sites. The selection of the chapter's content (i.e., what to include) was guided by the notion of 'the context behind the context'—the need to locate the intervention schools within the historically established social relationships in which they exist. Subsequent chapters will elaborate on how the interventions engaged with the social structures and values informing each context.

Notes

1   The percentage of a cohort of students enrolled in the first year (Class 1) of the six year cycle of primary education who are expected to reach Class 6.

2   Much of the content in this section draws on the first-hand in-depth knowledge of Dr Jack Maebuta, one of the chapter authors, who was born and bred on Nendo and maintains close relationships with Nendo communities.

3   Although Tonga retained its sovereignty, the first King's successor had enabled Britain to extend a degree of control over Tonga in areas such as education. Despite being a colony of Britain itself, the New Zealand settler government acted as quasi-colonial administrator for Britain in Tonga.

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Motutapu: A Relational Space for Collaborative Research-Practice in Oceanic Education

Seu'ula Johansson-Fua

Abstract

This chapter upholds the significance of context in understanding the domains of social relationships—'the context behind the context'—within which school communities exist (Sanga, cited in Airini et al., 2010). Fundamental to the 'relationality' theme which underpinned the research-practice education intervention informing this and other chapters, is the recognition that cultural identity formation within indigenous Oceanic societies is relational rather than individualistic. Education is acknowledged as a relational activity, one in which the space connecting researcher-practitioners and educational communities focuses on the development of contextually appropriate and robust research practices that can lead to the generation of new knowledge and understanding for improved learning. *Motutapu* is posited as a relational space for the interventions which brought together researchers and practitioners from small island 'developing' countries and from New Zealand. With particular reference to the Literacy and Leadership Initiative (LALI) in Tonga, the chapter recalls the dialogue and actions that progressed and challenged the relationships within the team and with school communities. Central to this is the notion of *vā*—the socio-spatial connection between persons, a relational concept which articulates the connectedness between people and between people and their environment, and which must be *tauhi vā* (nurtured) and *tauhi vaha'a* (protected)—so it remains strong (Thaman, 2008).

1   **Introduction**

The title of this chapter refers to a 2016 article in which I proposed a metaphorical *Motutapu*, a relational space for educational researchers to co-explore new and more authentic dialogue and conscious action for educational development in Oceania (Johansson-Fua, 2016). In doing so, I drew on Epeli Hau'ofa's (1993) call for an alternative view of the Pacific islands within Oceania which provided a path to reimagine 'development' from a renewed perspective. Key to Hau'ofa's essay is the inclusive approach to Oceania, that it is a space for all who call the region home. This Oceanic philosophy positioned itself on respect for the diversity of cultures, languages and peoples within the region, and the relationships between them, as the bases for a more holistic sense of 'regionalism'.

Motutapu, in most Polynesian languages, translates literally as sacred island. In almost all Polynesian archipelagos, one can identify an island called *Motutapu*. There is a *Motutapu* at the entrance to Tongatapu, at Te Avanui in Borabora, and at the entrance to Rarotonga. There is also a *Motutapu* at the entrance to the Waitematā harbour in New Zealand (Taonui, 2008). According to our Polynesian oral history, *Motutapu* are places of safety for travelers to rest before they continue to journey beyond the reefs, or where outsiders come to negotiate entry to the safe lagoons. It is a sacred space in that it is a middle ground. *Motutapu* is posited here as a relational space for a literacy and school leadership intervention program which brought together researcher-practitioners from Pacific Islands 'developing' countries and New Zealand.

With particular reference to program undertakings in Tonga, one of the educational contexts participating in the intervention, the chapter will recall the dialogue and actions that progressed and challenged the relationships within the team and with national communities (ministry of education and schools). By exploring the relationships within the team and across the extended partners, I give attention to the emerging lines of interconnectedness and interdependence in these relationships. In doing so, I draw on Konai Helu Thaman's elaboration of the processes of *tauhi vā*, and *tauhi vaha'a*, the nurturing and protecting of 'the spaces between' in order to strengthen relationships at various levels across and within contexts (Thaman, 2008), thereby fulfilling Hau'ofa's (1993) imagining of a strengthened Oceanic collectivity and connectivity.

The chapter takes a case study approach to gaining access to the Tongan context through which I aim to demonstrate the value of relationality in educational development. The case study also highlights the interconnectedness of people and the socio-cultural contexts within which they live. My interest in examining the processes of gaining access and maintaining relationships

within a research-practice team is related to issues of ontology and epistemology; in particular, those related to the nature of knowledge and knowledge production and the key questions of 'What can be known?' and 'How can it be known?'. I agree with Baily, Shah, and Call-Cummings (2015) that epistemological issues in relation to power, ethics, access and relationships require further consideration if we are serious about methodologies that hold us accountable and able to reap authentic knowledge that can be transformational for the researched. In this case study, I examine my own positionality as well as that linked to researcher-practitioners who are outsiders, who are insiders, and who are the 'inbetweeners' (Milligan, 2016).

2   Case Study: Gaining Access

Gaining access to a context is often not as easy as it is perceived. In fact, gaining access has a lot more to do with building relationships—*vā*—than research often permits. There are multiple levels involved in gaining access to a context and in particular to an 'education for development' context. At the first level, there is access to national ministries of education, curriculum units, examination units and teacher education institutions. At this level also are the various development partners and donors who are operating in the education sector (see Chapters 9 and 10 for more detail) and at times are involved in delivering development projects in the same field. Related to this first level is the second level of access, to the provincial or island educational authorities. The third level of access is that of the participant schools and classrooms which includes participation of school principals, teachers and students.

   At the fourth level of access is the surrounding communities that host the school and include the parents and guardians of the school children. The community level is often ignored and neglected when examining education for development in Pacific countries.

   In this particular case study, I wish to demonstrate the complexities within and across levels and illustrate the interconnectedness and interdependent relationships that cut across all levels of access. By doing this, I wish to demonstrate that the 'context behind the context' is far more complex than often perceived within Pacific countries. Drawing on the Literacy and Leadership Initiative (LALI) in Tonga, various intervention learnings, events and activities will be referred to in elaborating this complexity, including the following: the nature of relationality in Tonga; my own positionality as the senior insider member of the intervention team; issues arising from insider-outsider relationships within the team; and those focused on gaining access to, and nurturing

and protecting the *vā* within, the relational spaces of participant schools/class-rooms and school communities.

2.1   *Relationality in Tonga*

Tongans are deeply relational people; their whole identity and being is defined through the collective. Thaman (2008) notes the "importance of *vā* as the basis for Tongan social interaction" and that this "is reflected in the high regard people place on rules governing different kinds of interpersonal relationships and social interaction" (p. 464). She explains that "*vā* is used to denote inter-personal relationships" and that within these relationships there are behav-ioral expectations and social norms that are expected to be played out (ibid.). Consequently, the maintenance of the *vā* is also contextual, depending on the people involved (individuals, families, social groups) and the place (home, vil-lage, formal social event, work-place etc.). Thaman (2008) further highlights the importance of protecting relationships, or *tauhi vaha'a*. For Tongans, it is important to maintain harmony and peace between those connected through relationships, and as such being relational requires knowledge of the social context and the existing networks between individuals and groups. The 'knowledge' that is required to maintain good relationships in the Tongan con-text is socialized early in young Tongans and embedded in the ethical systems of Tongans.

Gaining access to the LALI schools and seeking the consent of school lead-ers and teachers to participate in our design-based research intervention, required also an understanding of Tongan ethical systems (Johansson-Fua, 2014). In the Tongan context, the four core values that define ethical systems are *faka'apa'apa* (respect), *feveitokai'aki* (reciprocity), *lototo* (humility) and *mamahi'i me'a* (loyalty). All relationships in Tonga are centered around these four core values. These values are expressed through *anga faka- Tonga* (behav-ior) and *lea faka- Tonga* (language). When these four core values are examined closely, it is clear that each core value is relational in itself, insofar as it involves a process of learning, gaining and giving. Further to this, the four core values are interconnected in that one cannot be practised without the others. Those in a relationship cannot practise *faka'apa'apa* (respect) without *lototo* (humility). Relationships within organizations, including schools, within communities and amongst *kainga* kinsfolk aspire to demonstrate these core values. Relation-ships are woven on these core values, *tauhi vaha'a* (maintained) and when bro-ken or strained, relationships are mended and reconnected through the same core values. As such these core values are publicly discussed, expressed and in fact are taught to school children from a very young age. These core values are the values that teachers and school leaders in Tonga are held accountable to

by their communities and their peers (Johansson-Fua, 2008). Understanding these four core values is key to understanding the 'context behind the context' for Tonga.

2.2   *My Positionality*

In establishing any given relationship within the Tongan context, people need to know 'where are you from' in a literal and figurative context. The question of your origin or the place where you stand is linked to your identity and your position in the socio-political context. Your socio-cultural rank and 'where you are from' determines how others respond and relate to you. In a highly ranked society, figuring out where one stands is key to establishing any relationship. The question of 'where are you from' refers to one's connection to the *fonua*—a term that refers to both the land and the people. The land that you are connected to also means that you are connected to the people of that land, either in the present time or through your ancestors from many generations ago.

As a researcher-practitioner who is 'native' (here I use the term native to describe my positionality from a socio-cultural perspective, rather than as a researcher) to this particular context, my own socio-cultural identity was the first positioning of 'where I stand' and my relationship to the *fonua,* being the land and the people. My socio-cultural identity included kinship ties as well as the religious community I am connected to. In this particular case, the *fonua* specifically referred to the island communities of 'Eua and Vava'u and the central district of Tongatapu where the participating schools were located. The second level of my positioning was related to my professional identity—where I work and what my 'status' is within that organization. In a small island community, there is very little separation of professional life from private life—thus one's socio-cultural identity and professional identity are in this context interconnected and interdependent.

Once the socio-cultural and the professional identity of the researcher-practitioner is identified the participating school leaders and teachers allocate a certain positioning to this person. I wish to highlight here that while there is considerable attention in the research literature drawn to defining the positionality (insider/outsider etc.) of a researcher (see for example, Lee, Liu, & Ham, 2017; Milligan, 2016), there is very little consideration of how those researched, the participants, may have defined the researcher.

The socio-cultural rank of the researcher-practitioner, once defined by the school leaders and the teachers, defines the level of interaction in the relationship. Is the researcher-practitioner someone of high status? Does this person have credibility? Can the person be trusted? Who are the people that are associated with this person? Who will benefit? Is this person qualified? Basically,

the key question is 'What *right* does this person have to access our school and our communities?' These are some of the questions that would have been discussed amongst the LALI school leaders and the teachers to determine the eligibility of the researcher-practitioner to gain access. The judgement of the school leaders and the teachers over the position of the researcher-practitioner, to a large extent defined the initial period of developing a relationship.

2.3   *Insider/Outsider Relationships*

But what of the researcher-practitioner who is not native to the context, who is an 'outsider'—how is the outsider guided through the process of gaining access? Again, when using the term 'non-native', I do so from a socio-cultural perspective, as a means to differentiate sub-groups within the researcher-practitioner team working in Tonga who were either Tongans or New Zealanders. In doing so I am mindful of increasing attention to the notions of 'insider' and 'outsider' in recent comparative and international education discourse (see for example, Arthur, 2010) and the call for alternative definitions and reconceptualizing of the classic dichotomy of 'insider' and 'outsider' research-practitioner positions. McNess, Arthur, and Crossley (2015) argue for the need to go beyond traditional boundaries of culture, language, gender, to include epistemological, ontological and disciplinary boundaries. These same writers have further argued for a 'third' liminal space that may have the potential to encourage new meaning and "which is constructed on the boundary between worlds where historical, social, cultural, political, ethical and individual understandings meet" (p. 295).

Others draw focus to the increasing blurring of boundaries between the local and the global (Baily et al., 2015) in an increasingly neoliberal environment and what this means for the shifting positionality of researchers. While I agree that the boundaries between the local and the global are increasingly blurred and merged, particularly in the areas of certain global discourses, I also contend that there is still a need to be specific about positionality with focus on the context (Crossley, 2010). To uncritically accept the increasingly blurred boundaries and the transnational nature of research and 'development', would be a mistake.

In support of McNess, Arthur, and Crossley's (2015) argument for an alternative view of the researcher positionality, Milligan (2016) argues for the notion of the "in-betweener", who has become the "knowledgeable outsider" (p. 249). Through Milligan's (2016) use of participatory methods and support for co-construction of knowledge to shift the power dynamics of data to also include the participants, she has put emphasis on multiple and shifting identities in different contexts. Similar thoughts have been argued by this writer

(Johansson-Fua, 2016) when I proposed the *Motutapu* relational space for Oceanic researchers—a space that reflected the Oceanic philosophy of Epeli Hau'ofa (1993) in his call for a more inclusive approach to a diverse region. Increasingly, there is a growing critique of the traditional 'insider' versus 'outsider' dichotomy for researchers and a search for an alternative and perhaps more authentic recognition of researchers' different positioning.

With regard to the LALI intervention, although access was granted for researcher-practitioners to enter the schools, whatever their positionality, that did not necessarily mean that the task of acceptance and access was completed. Like all relationships in Tonga, there is constant work to *tauhi vaha'a,* maintain the relationships and mend them when required. Gaining access for initial engagements does not necessarily mean that you are accepted into the field for the duration of the program. At various points in LALI, the teachers asked for a particular researcher-practitioner over others and they gave their reasons for the request. At other points, teachers expressed their concerns to particular team members, but not to others. The question of 'to whom access is granted' and the need to interrogate the influence of the researcher identity (Baily et al., 2015, p. 144) was constant throughout LALI. There was a continual process of negotiation and repositioning of the researcher-practitioner that was conditional on a range of events and other people during the course of LALI. This confirms reports of others, that "their positions as insiders were conditional and required continual negotiation" (Lee et al., 2017, p. 130) and demonstrates the dynamic interconnectedness of intervention events and activities, school leaders and teachers, and the researcher-practitioners involved.

While the team of researcher-practitioners involved in the LALI included some who met the traditional definition of either insider or outsider, it also included those who are outsiders but also insiders, and those who are insiders but also outsiders; they have learned to operate effectively at all the levels identified in this case study, and across the diversity of the Oceania region. Therefore, I would go beyond Milligan's definition of the 'knowledgeable outsider' to highlight those who are 'knowledgeable insiders'. They have recaptured Hau'ofa's Oceanic world and can move confidently between one Pacific country and another, build relationships at ministerial level as well as at school and community level, and importantly, because of their in-depth understanding of 'education for development' discourse, they are heard by and can influence development partners. They often speak multiple languages, have been educated inside and outside of the region, have conducted research in a range of countries and have expansive relationships across the region. These are the Oceanic researcher-practitioners who operate in a space that is inclusive, expansive and innovative. With regard to the increasing recognition given by

comparative and international development theorists in education and other areas, they are the researchers best able to facilitate both south-south and north-south dialogue. They are the 'scrutinizers' as defined by Sanga (2005): Pacific and non-Pacific people who "as a group understand both worlds; the metropolitan and the Pacific; the city and the village. They appreciate the tensions, complexities, and dilemmas of both worlds. As leaders, they see the need for change and aspire to develop a vision for the change" (p. 16).

2.4 *Accessing Schools and Classrooms: A Strengths-Based Relational Approach*

During initial visits to each of the participant schools, I took the time to introduce myself and explained the purpose and scope of the intervention program. I thought it was important to link the program to the wider national education agenda and how it contributed towards the Ministry of Education's mission. There were two key messages that were shared during this first visit. First, was to establish that the LALI was developed upon the invitation of the Ministry and that it was to support the Ministry's overall agenda for improving literacy in schools. A key focus of these conversations was to demonstrate that the program, although it may seem new, was to build on the existing work of the schools—that unlike many aid-funded interventions its adoption of a design-based research approach meant it was not aimed at replicating education programs from another country (see Chapter 4). It was very important from the start to clarify that LALI was to strengthen existing structures such as the national curriculum, weekly professional development sessions, and the overall mission of the Ministry. Although this may seem like common sense, this strengths-based approach and the commitment to working from existing structures went a long way towards building a sense of ownership and contributing to the sustainability of literacy improvement in the participant schools and across the education system.

The second key message was to establish a relationship between the schools and the researcher-practitioner team. Building relationships that are based on trust and respect supports the collection of more authentic data (Milligan, 2016; Johansson-Fua, 2009, 2014). One of the key strategies of the LALI program was the use of data to inform practice and intervention. A few months after the first data collection of teacher practice and student performance, we called the schools together in their clusters to collectively analyze the data. In one particular cluster, there was some resistance to accepting that the data could be a reflection of their practices. This was especially so for the school principal and teachers of one school that claimed a 'good' reputation and were very proud of the fact that they had a relatively high number of students who passed the

secondary school entrance exam. The resistance from this particular school to accepting the evidence that many of its students were not well served by the school's structures and processes went on for quite some time; while they continued to be part of LALI, they made it clear that they did not need the 'help' on offer. However, about midway through the initiative, this same school was the first to invite intervention team members to several of their classrooms to demonstrate a specific teaching approach they had learned from cluster workshops. This shift in attitude came about, after much thought and effort going into developing a meaningful relationship with the school. Another key factor contributing to the shift in attitude arose from the strengths-based approach underpinning the intervention; the team members ensured that the existing strengths and good practices of that school were identified and given due recognition during workshops and other meetings. Subsequently, the same school took on several suggested strategies from the intervention team and with their own modifications ran the program in their school.

For the school to have moved from a resistance stance to one of acceptance and innovative adaptation of new strategies, speaks to the learning that took place for both the school and the intervention team, the researcher-practitioners. The teachers and school principal learned to trust the team, to accept that they were in a safe place for their learning and trialing of new ways of teaching literacy. An example of this was demonstrating to the intervention team members their application of a school wide approach to writing stories, an initiative that went beyond the expectation of the program. And, importantly, once teachers and the school principal began to see improvements in the data on their students' literacy outcomes, this school completely turned their school vision from targeting only the top students to focusing on shifting all students' learning with a particular focus on 'at risk' students (Auckland Uniservices Ltd [AUL], 2016).

The researcher-practitioners' understanding of the nature of relationality in this context encouraged them to practise appropriate *tauhi vā* in giving the required time to building a positive relationship with the staff of the school. The school was not rushed into adopting new ways; rather the researcher-practitioners took time to understand the school context and identify existing strengths through profiling activities and the sense making sessions. As part of appropriate *tauhi vā*, the intervention team held back until they were invited to the classrooms by the teachers. The example from this one school demonstrated what we hoped would occur when relationships are authentic and collaborations are worthwhile. It is through such examples that we can appreciate the time dedicated to building and nurturing relationships on the basis of deep understanding of the context.

2.5 *Community Access: Talanga Laukonga*

One of the key challenges of the insider/outsider relationship was when we worked towards a common school leadership development framework. Given there were multiple countries involved in the overall intervention program, there were debates on whether we design a school leadership framework that was regional in nature or one specific to each country context. Each of the key researcher-practitioners came to the intervention with pre-determined preferences for a school leadership framework, based on experience and knowledge from their own contexts. However, in each of the intervention sites involved there were already existing school leadership frameworks which reflected thinking about school leadership development for each context. In essence, we had access to multiple school leadership frameworks to choose from and use. The debate and negotiations within the team revealed the cultural differences and the power dynamics within a team that consisted of both insider and outsider. Because the outsider researcher-practitioners were also residents of New Zealand, the country that provided the funding for the intervention, it was easy for the insider team to associate them with the donor. As such the power dynamics within the team, despite the best of intentions, became clouded by the 'association' and seen as reflective of the unequal power relationships often perceived in aid-funded programs. Moreover, the conversations and debates over the preferred school leadership framework had also challenged some of the relationships within the insider team, revealing our assumptions, weaknesses and strengths.

What is reported above is by no means an unusual interaction found amongst a diverse group of researcher-practitioners, particularly those working in an 'education for development' context. The work of Anderson-Levitt (2012) focuses on the global/local nexus and asks how power influences "the diffusion of ideas around the world and contests over their reinterpretation in local settings?…whether in their interest or not…nations and international organizations actually do exercise power both overtly and in hidden, subtler way" (p. 448). Further to this, Baily et al. (2015) pose questions that are relevant to this discussion on the tensions that are present in various interactions amongst comparative education researchers. They ask, "What role does indigenous knowledge play in the research process? Who defines what is indigenous?" (p. 148). Baily et al. further stated that "the lines between the powerful and the powerless are relational, shifting depending on who is in relation with the other" (ibid.). With each stage of school visits, however, the insider researcher-practitioners grew to appreciate the new knowledge and skills that were shared by the outsider researcher-practitioners. With each boat ride and delayed flight, the outsider researcher-practitioners grew to appreciate

the complexity of the context and value the knowledge and guidance of the insider researcher-practitioners.

The turning point in this relationship for the insider team, was the opportunity to visit schools and to share ideas with communities through *Talanga Laukonga* (talking about literacy). It was not until the later part of the program that we interacted with the school community. In this particular context, the primary schools are located in a village with the community being responsible for general maintenance of the school property and fund raising to meet other costs of running the school. As part of the program design, the involvement of the community came about as a result of the schools' desire to see greater support from parents towards the children's learning. While most of the schools enjoyed the financial support from the surrounding villages, the teachers and the school principals recognized that parents could do more in terms of supporting their children's learning.

The *Talanga Laukonga* initiative was introduced as a platform—modeled on the traditional *fono,* a community gathering where ideas are discussed—for the researcher-practitioners, the school principals, the parents and the community to share ideas about supporting literacy at home. To access the community and use the *fono,* the school principal was the primary guide for the team to gain access. At the first meetings of the *Talanga Laukonga*, it was evident when the school principal enjoyed a strong relationship with the community; it was a full house. In earlier sections of this chapter, I made reference to four core Tongan values and that most leaders are held accountable to these core values. This is particularly the case for small village communities where private and professional lives are seen as one and the same. The participant schools on Tongatapu had school leaders who were often from another town or village and did not necessarily have kinship ties to the communities. In such cases, the school principal had to work harder to gain the support of the community.

A highlight of the visit was when one of the outsider researcher-practitioners actively participated in a *Talanga Laukonga*. Although the *Talanga Laukonga* was in the local language, through translation she was able to share knowledge and experiences with the community. It was an opportunity for the team to re-evaluate the guiding school leadership framework and to observe another dimension to the role of a school leader in a village context. In this instance and many other instances, the team "became present to each other", in ways highlighted by Todd (2011) who drew attention to the "meeting point of different ways of life, when researchers become present to each other. A space of relationality where we become present to each other. A space of transformation that raises ethical issues of facing otherness and political openness for

new beginnings" (cited in Allen et al., 2013, p. 125). As indicated earlier, it is through the long hours of being together that we get to know each other and discover our complementary strengths and our compensatory weaknesses. It was through travelling together—by road, plane and water—and, notably, the sharing of food that we grew to know each other as 'who' rather than 'what' we are. As summarized by Allen et al. (2013):

> The idea of "becoming present" to each other is not something we can know in advance. We cannot know beforehand "who" we are, as our "who" is not an essence. "Who" we are, is created in a relational process with the other through our talking and intra-acting with them. Put another way, our differences are not essences born of identity, but created in moments of relation with others. (p. 125)

Through the *Talanga Laukonga*, the interconnectedness by way of dialogue about literacy, between school leader, teachers, parents and the intervention team members (both insider and outsider) was made obvious and strengthened. What we learned is that the *Talanga Laukonga* encouraged a stronger relationship between school leaders and the parents, a key point that was absent from the educational leadership framework that we had debated early in the program, and one borne out by findings of the intervention's final impact evaluation which demonstrated a significant shift in school leaders' connectedness to their communities (AUL, 2018).

3   Concluding Comments

The concern with understanding the 'context behind the context' is more than a concern with improving aid effectiveness. For me it is related to issues of epistemology, specifically those concerned with the nature of knowledge and knowledge production. The search for authentic knowledge that can be transformational for both the so-called beneficiaries of aid interventions, in this case the participant school communities, and the researcher-practitioners charged with delivery, requires a re-articulation of the methodology adopted, with particular attention to matters of power relations, ethics and processes for gaining access.

It is in this concern with re-articulation of a research methodology that we draw attention to relationality as a space for deeper engagement with, and learning *from,* the context. Through LALI, we have attempted to un-learn assumptions about the transfer of models from one context to another, to

problematize the notion that because it works in New Zealand it should work in Tonga or in Solomon Islands. Through a willingness to be engaged in a relational space, the outsider and the insider became 'present to one another'. Through the act of tauhi *vā*, practising relationality and demonstrating respect for the people and the land, outsiders also became part of the context. What was learned through the LALI was transformational for the schools—for students, teachers, principals and parents; for the staff of the national ministry of education; and, importantly, for the research-practice team. Collectively, they formed new understandings and knowledge of improving literacy learning within the schools of a particular context. The new understandings and new knowledge enabled transformation because the relational space was authentic.

The learnings from the LALI drew on a range of knowledge sources such as local school knowledge, organizational knowledge, and the educational knowledge of the research-practitioners within the intervention team. However, in my view as a researcher-practitioner, the key learning from the LALI was that it is *within* the context that solutions can be found, that in order for longstanding problems identified within the comparative education and international development literatures to be addressed, 'education for development' must be contextualized. For this to happen effectively in the small 'developing' states of Oceania, it is maintained here that the utilization of indigenous knowledge systems is essential. Although the potential role of traditional knowledge in research and development work is still relatively unexplored, I consider that the LALI intervention team's attention to key concepts from the Tongan knowledge system both held the team together and ensured meaningful relationships with the schools and the communities, and, consequently, reaped the transformation and learning that took place in the schools.

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Design-Based Research as Intervention Methodology

Rebecca Jesson and Stuart McNaughton

Abstract

In this chapter, we outline the design-based research (DBR) approach to developing and implementing a contextually appropriate intervention aimed at enhancing student learning outcomes. As a form of Intervention Science, the DBR approach draws on the Learning Schools Model (McNaughton, Lai, Jesson, & Wilson, 2013) in addressing educational challenges and simultaneously contributing to an understanding of the educational processes of a specific context. As the name implies, the approach requires designing and refining educational approaches that intentionally build on what is present within a context, and address students' learning needs. We adopt the approach in order to understand any as-yet-not-well-understood educational processes, to draw on existing educational expertise and through this process build capability to solve ongoing challenges within the context.

At the heart of the DBR approach is a set of partnership relationships: between policy makers, academics and schools; between theory and practice, and between 'outsider' and 'insider' researcher-practitioners. These partners contribute their various types of expertise to redesign instruction in ways that are both theoretically and practically appropriate and effective.

The DBR approach is used in situations where it is necessary to develop interventions from, and for, and with the people within a specific context. Thus, this contextual approach is inherently relational (Jesson & Spratt, 2017). The DBR approach was adopted for the interventions that form the case studies in this book. This chapter will explore how DBR was employed, and the adaptations that were made for the specific contexts.

Keywords

1   **Introduction: An Intervention Approach That Intentionally Builds**
         from and for the Context

Children belong. They grow up and learn within families, within villages, within towns, communities, churches, clubs, networks, countries and regions. Learning happens within those settings where children belong as they interact with the other participants in those settings and as they grow into the various roles of child, friend, sibling, and student (Bronfenbrenner, 1992). Each of these settings is dynamic and open. They change over time. And other settings become part of the overall context. Education is a major part of the overall context. Teachers participate in and contribute to children's belonging as they too become major sources of guidance and influence. Schools and classrooms also change as teachers and principals and children join or move away.

Our view is that an educational intervention which is focused on children must be responsive to the overall context, learning from that context, and entwining that context in the new understandings it brings. Any person trying to understand learning and education in a place needs to understand deeply those contexts within which children are learning. These contexts need to underpin any design for intervention. Design-based research, as a methodology, was chosen for the intervention design in the program because the underlying approach embraces complexity in context (Brown, 1992). The approach of embracing the complexities within systems sits in contrast with more traditional or experimental intervention designs, which seek to isolate and test identifiable and defined variables. Designing and testing ideas in the context for which it was designed means that the approach allows an intervention to learn, and to respond to context.

In this chapter, we outline how we worked to design, develop and refine an intervention explicitly for a particular place, with a particular set of learners, teachers, leaders and schools, in a particular country. With this in mind, we drew on the design-based research approach to developing an intervention. The process we used was the Learning Schools Model (McNaughton, Lai, & Hsaio, 2012) which was developed as an intervention for schooling situations facing hard to solve educational issues based on an in-depth understanding of the contextual issues at play.

2   **What Do We Mean by a Design-Based Research Approach**

It is from that contextualized perspective that the intervention approach was developed. design-based research (DBR) employs the key features required

of a context-specific intervention design, in that there is a commitment to addressing persistent problems, from multiple perspectives, using collaborative design, achieving both research and practice aims (Anderson & Shattuck, 2012) and embedding processes within a system for continuing to develop and improve (Bryk, Gomez, Grunow, & LeMahieu, 2015). The approach also requires relational understandings between researchers and practitioners, who together seek co-development of knowledge, rather than to transfer knowledge from one partner to another. Together, researcher-practitioners are positioned as co-designers of the intervention within ongoing and iterative professional learning communities (Jesson & Spratt, 2017).

The Learning Schools Model was developed in New Zealand to address long-standing disparities in educational attainment. It is a process-oriented intervention approach, which uses the collection and analysis of data as the basis for designing the response. Through the Learning Schools Model processes, the context dictates the design of the intervention response. The nature of the intervention emerges through engaging in the process and the focus of the intervention is context-specific and selected, based on the intersection of the strengths and needs of the students and the strengths and needs of the teachers. A context-specific approach means that the design of the implementation also can be tailored (McNaughton, Lai, & Hsaio, 2012). Like all design-based research, the core to our approach was to help solve issues for education in the local context, while at the same time contributing to understandings about educational processes. Our theoretical basis was relational, seeking to incorporate the ontologies of the context. Our methodological basis was processes-oriented, for designing a context specific response. Combined, these two bases were intended to achieve the twin goals of solving urgent problems of practice while advancing more general educational understandings (Anderson & Shattuck, 2012). In order for this to occur, the design process required partnerships between researchers and practitioners with their communities, and where possible policy makers, using mixed methods of educational research, and focusing on multiple cycles of design and testing.

2.1 *Implications for Our Interventions*

The most general shared concern across the two countries involved was literacy and leadership in their primary schools. This overarching view had been established by the national ministries of education and international development agencies. It provided the framework for developing specific foci through the partnership. But driving our literacy and leadership intervention was the intention to understand the strengths and needs of the local educational contexts. Our approach was to start out by avoiding any assumptions about what

the key 'problems' or 'solutions' were. We did not want to default to a program, as it were 'off the shelf', which may not be what was needed or what would work best for the local context.

Instead, we began by gathering multiple sources of evidence of information to provide a rich picture of the children's educational context; in our case, we sought to understand children's language and literacy learning and development in the participating schools, and the roles of teachers, leaders and more widely the local community and their resources. Thus, the approach enabled our interventions to be built from and for the contexts in which we became engaged.

3   Research-Practice Partnerships

With students at the heart of the enterprise, improving student learning must therefore be the collaborative effort of parents, communities, teachers, school leaders, and policy makers. For this reason, our design-based approach relied on collaboration between the researcher-practitioner team working with teachers and school leaders in each school, cluster and country. Such a partnership draws on the different and multiple types of expertise that partners bring. Within the researcher-practitioner team, there were combinations of theoretical knowledge, educational practice, deep knowledge of context and historical development of the education systems involved, language expertise and understanding of the systemic processes and practices of the country concerned.

For an intervention to be well designed, each of these types of expertise is required to contribute to the intervention design. Our approach to this complexity was to incorporate the processes of co-design as an ongoing, planned dialogue between partners (Jesson & Spratt, 2017) acknowledging and incorporating these sources of expertise. The process of ongoing co-design and then evaluation was intended to allow alternative explanations and understandings to challenge perceptions thereby pushing for a deeper, more nuanced understanding and response. Clearly, the process relied on strong, explicit and embedded relationality as co-designers worked to negotiate epistemologies, ontologies, histories, and understandings about the learners, the learning context, the teachers and the teaching context. This process was designed to be iterative and to enable continuous improvement.

Research-practice partnerships are increasingly acknowledged as powerful ways of developing interventions embedded in contexts. Snow (2015) identifies four principles underpinning such partnerships: (i) that knowledge comes from both research and practice; (ii) that the endeavour addresses pressing concerns of practitioners, (iii) that improving practice requires evaluating the

effectiveness of an intervention; and (iv) that the intervention requires attention to systemic change (ibid.). In our case, the collaboration between both 'insider' and 'outsider' researcher-practitioners, as well as teachers and leaders in the co-design was central to understanding and addressing the concerns of those working in the service of children's learning. This collaboration was informed by the belief that teachers and leaders would engage meaningfully with the intervention, because they helped develop it. Moreover, the intervention was intended to be informed by teachers' and leaders' values, beliefs and understandings of knowing and learning, in order to produce a co-design that was both credible and helpful for teachers because it was designed for the children in their own schools (Coburn, Penuel, & Geil, 2013). A further advantage is that the shared understanding and designing makes it more likely that practices are embedded and able to be sustained beyond the specific timeline of the project. There are few demonstrations of sustainability of educational interventions. It is maintained here that design-based approaches are among the demonstrations that this is possible (Lai, McNaughton, & Hsiao, 2011).

4   A Robust Evidence Base

As a research process, our approach relied on understanding educational processes and outcomes. Therefore, context appropriate and robust data were required upon which to understand existing desired and less desired educational processes and patterns. These data were to also be used to develop an intervention design that could build different patterns of processes and outcomes for the future, but crucially needed to be sensitive to ongoing evidence. In order to begin that process of redesign, the intervention approach starts by gathering evidence about the processes currently occurring (Alexander & Shattuck, 2012). The collection of empirical data serves the purpose of understanding the relationships between teaching and learning given the existing history, theories, resources and systems. Drawing on the collective expertise, the evidence is used to develop hypotheses for improvement that drive the instructional design. In this way, cycles of data collection, analysis and feedback were used by all participants to design increasingly more effective instruction for children. These cycles were continued across three iterative and overlapping phases, which followed a systematic pattern, but performed slightly differing functions.

The first phase, we called profiling. The purpose of this phase was to develop understandings about teaching and learning processes. To do so, we needed to agree on and develop appropriate measures and tools, to collect multiple sources of evidence, to analyze the evidence together, and to hypothesize

about 'problems' within the apparent processes, and possible 'solutions' which would underpin the desired changes and therefore the intervention logic.

In the interventions discussed here, the intervention logic was captured as a conditional hypothesis, a truncated version of which is provided below:

If

– teachers and leaders have skills and knowledge to deliver balanced literacy programs, including the skills to undertake regular formative assessment
– and teachers and leaders have knowledge of the patterns of literacy and language teaching and learning currently occurring in their classrooms,
– and teachers and leaders are collecting and jointly analysing student achievement data (formative and summative) on a regular basis
– and teachers and leaders participate jointly in school-based professional learning focused on collectively agreed literacy goals and delivered by credible, trusted local practitioners
– and teaching and learning resources tailored to children's specific learning strengths and challenges and customized for local contexts are developed, and teachers supported to use them effectively in classrooms

Then

– Teachers will use a range of instructional approaches and techniques tailored to their students' needs
– Children will have better access to, and be actively using, resources to support reading, oral and written language development
– Teachers and leaders will use data to set realistic literacy goals and targets at the school level
– Students will increasingly meet curriculum expectations in literacy and language domains.

Having agreed a focus and intervention logic, the second phase was the resourcing phase. Collection of evidence and analysis continues, but in this phase, the focus is on professional learning and support in order to implement the agreed focus, in line with the evidence. In the final phase, the focus is on sustaining the processes of designing and refining instruction, based on the evidence. In the following sections, we outline the processes within each of these iterative phases.

The phases that we describe below are supported by a rigorous research and development process. While the design-based approach is responsive to the local context we do not compromise the need to have defensible evidence that what has been constructed has worked—that it can be attributable to the co-constructed intervention—and the degree to which it has answered the question of the educational significance of the overall intervention. We take seriously the need to establish as best we can what has changed and whether any changes can be associated with what was done.

This approach to research and development is both an ethical and a scientific imperative. All participants have committed precious time and resources to the intervention and it is their collective right to know what worked for whom, under what conditions and at what scale (Bryk et al., 2015) within and across countries. We need to know also to build the knowledge of how to continuously improve within countries, and more broadly to add to the scientific knowledge about interventions for schools, or about literacy and leadership, and especially about how these can be both general as well as culturally specific phenomena.

We have developed methods to achieve this rigor. They are responsive to and 'control' for the complexity of a purpose-built local intervention designed on the ground, which is likely to change over time, within schools that are in constant change, for example in staffing and students, and with policies and practices that may be put in place irrespective of the ongoing intervention.

The core features of the research and development design were repeated measures of students, teachers and leaders; use of a 'projected baseline' through the profiling phase and replication across year levels, schools, clusters of schools and countries. The repeated measures provide us with patterns and trends which can be associated with the intervention and its changing nature over time. Statistical modeling (hierarchical linear modeling [HLM]) from the projected baseline is the means by which we avoid using 'control' groups. We project, using the actual data from the students and schools, what achievement would be like one, two and three years out from the start of the intervention. This enables us to make comparisons with the counterfactual; what would things have been like if we had not carried out the intervention? Replication is a core process of good science. Each time we are able to show a pattern of change was systematically associated with intervention with more than one year level, more than one school, more than one cluster and even more than one country we increase the believability of the results.

This is a quasi-experimental (not fully experimental) design. While it did not use randomized assignment of schools to create a control group as a Randomized Control Trial would, the features give it rigor. Rather than attempting to minimize the impact of context on the design, the features allow the intervention to be tailored for the context. The co-design processes mean that each stage of the research process has emerged from that context (see Jesson & Spratt, 2017). Analysis is based on quantitative methods. We use statistical techniques to answer the question about what worked and the degree to which educational challenges were met. The techniques are not just about statistical significance. They are also the means for establishing 'educational significance'—was the change meaningful in terms of the original co-construction of the teaching and learning challenge?

But the data used in the design are like providing a skeleton and needing flesh on the bones to make a whole. The flesh is provided by the qualitative data. The reflection and documentary evidence is layered on to the core research and development design to provide the richest picture possible of what happened and why.

5   Phase 1: Profiling and Sensemaking

In traditional terms, the profiling phase allows the collection of baseline data about the teaching practice, the learning processes and the learning outcomes. It establishes what achievement looks like across year levels providing the projected baseline for what the levels would be if the intervention did not occur.

As a process of co-design, however, it also allows shared understandings amongst teachers, school leaders and the intervention team about the patterns of learning, and the patterns of teaching in each context. The sources of data relevant in each context were negotiated amongst the researcher-practitioners, and tools for the collection of the data were co-designed. The process was tailored purposefully to understand what would be the most appropriate context-relevant questions of student language and literacy learning alongside important aspects of teaching practice. In each place, data collected included standardized test data, teacher collected data, classroom observations, teacher interviews and leader interviews. Which standardized tests were best to collect, what the teachers would collect data on, the focus of the observations, and the questions within interviews were all co-designed by local and external team members.

The profiling phase was designed to uncover student achievement and learning patterns in literacy and language. To do so, we used a variety of measures including emergent literacy, phonemic awareness, alphabet knowledge, decoding, comprehension, and speaking and listening. Classroom observation data also allowed an examination of teaching and learning patterns in literacy and language with a focus on the relationships between what teachers were teaching and what students could be observed learning. Our visits to schools also sought evidence of the resourcing apparent for literacy and language needs. As a data collection exercise, at this stage no judgements were made about quality. Observation required watching the teacher and thinking about what they are teaching then watching the students and thinking about what they are doing.

The importance of all these sources of data is to understand patterns of student strength and need alongside patterns of teachers' and leaders' strengths and needs. However, judgements such as 'strengths' and 'needs' are contextual,

contestable and culturally embedded. Our process for coming to agreed understandings was called sensemaking. In these sensemaking sessions, the data allowed teachers, leaders, and the intervention team—as researcher-practitioners—to co-design, by engaging in discussion and debate about the meaning of the data. Meanings that could be contested included the relationships between the teaching patterns and the learning patterns within each context; hypotheses and shared understandings about their effectiveness and what changes in practice were needed. The sensemaking sessions with teachers and leaders from the participating schools explored data and theorized the relationships between teachers' actions and use of resources, the learning processes that could be observed, and the learning outcomes that students achieved. An example of such a session is the shared analysis of the classroom observation data. Using these data as a starting point, teachers and leaders worked alongside researcher-practitioners to theorize the sorts of classroom approaches that students would benefit from, given their patterns of learning. They then compared these to the sorts of practices observed, in order to reconsider what a lesson could and should look like. In these ways, teachers and researcher-practitioners were engaged in comparing what is, as well as developing a dialogue about what ought to be.

Among the patterns in the evidence on which the sensemaking draws, is the variability that already exists within classes, across teachers and year levels and schools. Focusing on this variability achieves two purposes. One is to make apparent the existing strengths. Another is to establish that there are 'pockets of promise' already existing in the local context which we can collectively learn from in the co-design process, as this teacher explained,

> …we ask each other questions about how or what things they have done in their classes and it encourages me to try these new approaches. We ask each other about their practices and strategies and I really get encouraged from these new ideas shared by and with other teachers, Sometimes, I also ask other teachers for advice about how to teach certain topics on literacy.

The outcome of the sensemaking process was the development of contextually appropriate hypotheses. In each of the two interventions under discussion, the hypotheses represented changes that teachers would make to their practice, which would result in different types of engagement from students, which would result in changes to learning outcomes. An example of such a hypothesis is the logic underpinning the shift to more open-ended tasks or questions. The hypothesis is phrased as a causal statement that addresses both teaching and learning, for example, 'If teachers ask students to write a meaningful story,

students will be more engaged in writing, and spend more time writing'. The shared agreement about the desired shifts to learning and the desired shifts in practice shaped both the content of and process for intervention in each country.

While the sensemaking processes allow an examination of the data from a variety of perspectives, they have a dual relational function. In the initial stages, the sensemaking workshops serve to establish practices of a community for professional learning. Because data were presented with no judgements, we found that the process of interpreting data together strengthened our shared understandings about the nature of literacy, of leadership, of teaching and systems, necessary for the intervention.

> Before we didn't talk…about the achievement of the children. We just talk[ed] about the techniques. We focus more on how the children are achieving learning now.

As we talked with each other about what we were seeing, we were also able to talk together about what we wanted to see, and why. As such, we began to 'see' how we each understood the terms a little differently, and worked from differing mental models of what 'good' looked like. It also strengthened internal team relationships and external relationships with schools and Ministries. It provided an initial foundation for the ongoing collaborative problem solving and co-design, based on data about a focus on student learning.

The sensemaking sessions were designed to allow participants to share and contest ideas about the nature of the patterns that emerged from the multiple sources of data. As a group we were charged with refining our combined ideas to develop an intervention program that built from the strengths of the students, was targeted to the needs of the students, drew on the expertise of teachers and leaders, while expanding their repertoire to meet students' needs. The outcome of these session was key areas of focus and next steps for students, teachers and leaders. In short, sensemaking allowed us to agree on what changes were needed and what was already in place that would support those changes.

6   Phase 2: Resourcing

Having developed hypotheses for change and an intervention logic, in the second phase, the focus shifted to resourcing those changes. In our intervention, there were two key ways that the changes were resourced; firstly through people: through processes for professional learning and capability building; and secondly through physical resources: plans, notes, books and tools.

In this phase, the processes developed for collaborative analyses of evidence continued, but with a slightly different purpose. The analyses now supported the co-design of what resources were needed to build on strengths and to address needs identified. The resourcing included: co-designed teacher formative assessment tools, planning templates, teacher and leader professional learning and development (PLD), school visits, opportunities, provision of specialist staff, the development of new infrastructure (data collection tools) the development of texts for use with students, learning resources and community and family engagement meetings and workshops.

Professional learning was a key component of this phase and designed in cycles, responding to the classroom-based cycles of assessment data and observations. This ongoing processes of assessing, moderating assessments with colleagues, and planning next teaching steps collaboratively was a core professional learning process. The collective processes were described by one teacher thus:

> This data shows us what we are not doing well, areas we must improve on and we then incorporate the information into planning our school goals and classroom goals. If the data shows that the children in my classroom and school are weak on reading, I would then plan and prepare my future teaching to focus on improving those areas.

Through this process, teachers and school leaders learned about how students learn, and the types of responsive teaching practices required for further learning. Analysis of classroom observation data also allowed them to see alternatives to the current patterns of teaching and learning in classrooms. For example, in classroom observations, where most feedback to students was coded as 'correction of incorrect responses' and few were coded as 'prompting for further thinking', the discussion about differing models of feedback could begin.

The data collection and analysis component was therefore an ongoing and integral component of teacher and leader professional learning. As such, the professional learning was embedded in discussion of what was observed, what might be an alternative to common practice. Those understandings were built based on the collective expertise of teachers and leaders through the processes of talk.

7 Phase 3: Sustaining Processes for Ongoing Review

In Phase 3 the co-design, data analyses, PLD, resource development all continued. In this phase these processes needed to become embedded, which

required an explicit focus on sustainability of these processes. One example of sustainability came through the embedding of the use of evidence to drive teaching decisions and discussion of practice in professional learning groups, as this leader explained;

> The most important change for me so far is the building of teamwork and collaboration amongst my staff...We also share ideas in making our school goals—they help me to address the school goals and discuss ways to achieve these goals. We also discuss the school goals in term of the year level goals and ways these can support each other.

The potential for sustainability arises from the practices and sites developed based on context. Potential also sits in the shared use of tools and texts, and in the continued practice and increased capability that has been developed through the co-design processes. This capability to collect, analyze and respond to multiple sources of evidence about a problem means that an outcome of this phase is the identification of a new problem and a new cycle of phases begins to be established. For example, an intervention focus on assessing students' writing could move to using the assessment for planning and teaching. As explained by a Temotu teacher,

> The TLS trained teachers are committed to continue with teaching literacy and sharing ideas with each other. Even if we are moved to other schools, we want to continue with practising the skills we learned from TLS such as doing assessments. The assessment approach is most important to start any type of planning for learning because student results show us clearly what the learning needs of the children are and that is where lesson planning and preparation must start.

8   Conclusion: Design-Based Research Processes for Context-Specific Intervention

School contexts are diverse and dynamic, and while there are some common features of effective practice, these need to be tailored to specific contexts and used with discernment based on the strengths and needs of different learners. Within the design-based approach the context purposefully underpins the identification of hypotheses about the issue and underpins the design of the intervention. The cultural norms and practices of the local community are important sources of evidence, critical to the design process.

Improving student outcomes is a collaborative effort of teachers, school leaders, communities/parents and system stakeholders, and therefore all are engaged in the processes. Within the design-based approach, co-design was a strategy for engaging all in the processes of improvement.

Improving schooling processes requires a strong evidence base, with ongoing cycles of analyzing, and making sense of the data in light of the context. These data allowed us to develop and resource targeted interventions to meet the identified challenges in context appropriate ways, and build sustainable expertise to continue to identify and problem solve such challenges.

We argue here that the DBR approach we employed was a shift in focus for an international aid initiative. The experience represented by the case study interventions is therefore valuable evidence of the potential of DBR to match the dynamism of a context with a responsive design.

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Learning for Human Development

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Literacy Learning

Rebecca Jesson

Abstract

Literacy is generally understood as the ability to understand, interpret, create, and communicate orally and in written materials. Common to all definitions is the understanding that literacy depends upon language, and that language underpins thinking. For this reason, literacy and language are inextricably entwined. Moreover, both literacy and language can be considered as cultural tools for thinking.

In education systems, curriculum statements frame both what schools consider that literacy should entail, and how it should develop over a children's time at school. These statements structure the definitions of success and identified signposts for literacy development. Thus, all literacy activities are bounded by notions of the purposes and definitions of literacy within curriculum statements, and teachers' beliefs about what students can achieve and what is important to learn. However, making meaning with texts is at once a cognitive, social and cultural activity, as children develop tools of knowing and learning within and across learning contexts. So, for children, literacy is not only school bound, but is cultural, intergenerational, and social. These important literacy foundations are often underexplored, sitting outside the institutional literacy boundaries.

In this chapter, I describe how these conceptions of literacy were nudged within an intervention paradigm. I problematize school based, sometimes monolingual, notions of literacy. I consider how curriculum statements envision literacy, how students are thought to 'develop' in literacy, and what 'progression' needs to occur in literacy as children progress.

Keywords

literacy – language – curriculum – knowing – learning – texts – cognitive – social – cultural – intergenerational

1   Introduction

In this chapter, I draw attention to the dimensions that affect how children learn literacy. These factors are presented individually in the first section and serve to provide a theoretical frame for conceptualizing a literacy intervention specific to context. The definitions of literacy are identified and distinguished from the statements that serve to bound school-based notions of what literacy entails. I then consider the role of teachers and the role of texts and activities in literacy learning. Finally, I consider what children engage in, in order to become literate. In the second section of the chapter, I offer examples of how the researcher-practitioner team sought to weave all these considerations into the design of the literacy interventions. I conclude by arguing that given the complexity, literacy should not be considered a basic skill, and that children must be acknowledged to have the right to use their existing textual, social, cultural, linguistic, and cognitive resources for learning.

2   Theories of Literacy Learning

Definitions of literacy are contested and vary. In different contexts and different conversations, literacy can be positioned as a contribution to economic, social or political objectives (Wagner, 1993). Common to all definitions is the understanding that literacy depends upon language, and that language underpins thinking (Montoya, 2018). For this reason, literacy and language are inextricably entwined. Moreover, both literacy and language can be considered as cultural tools for thinking (Fransman, 2005).

Institutional discourses systematically structure the interactions among people and between people and artefacts including texts (Forman, Minick, & Stone, 1993). In education systems, curriculum statements frame both what schools consider that literacy should entail, and how it should develop over children's time at school. Across contexts, these statements function to structure the definitions of success and identified signposts for development, and are voiced, reflecting discourses, and agendas (Wagner, 1993).

In classrooms, literacy learning experiences include the texts that students are asked to read, consider and respond to, as well as the texts that students author, and the sorts of thinking that children use these texts for, and the sorts of interactions that they have about those texts (McNaughton, Phillips, & McDonald, 2000). These literacy activities are potentially bounded by notions of the purposes and definitions of literacy defined by curriculum statements, and teachers' beliefs about what students can achieve and what is important to learn.

For children, making meaning with texts is at once a cognitive, social, and cultural activity, as children develop tools of knowing and learning within and across learning contexts. So for children, literacy is not only school bound, but is cultural, intergenerational, and social (Bronfenbrenner, 1992). These important literacy foundations are often underexplored, sitting outside the institutional literacy boundaries.

All these considerations frame how two Pacific literacy improvement initiatives (Temotu Literacy Support [TLS] and Literacy and Leadership Initiative [LALI]) sought to embed these conceptions of literacy within an intervention paradigm, itself bounded by discourses of politics, economics, and society. Also discussed is how the creation of artefacts and texts was intended to widen the boundaries for what might be understood to be literacy, consider the role of language, and link school and home literacies.

3 Framing the Literacy 'Issue'

Literacy has been at the forefront of the global education agenda since the first creation of the United National Educational, Scientific, and Cultural Organization (UNESCO), and the positioning of literacy as a human right, and, as an enabler for the realization of other rights, an end in itself. Literacy as a 'basic learning need' was enshrined in the 1990 Education For All declaration, which then formed the basis for setting education goals for the Millennium Development Goals (MDGs) and subsequently the Sustainable Development Goals (SDGs). Literacy is also the 'education' indicator within the Human Development Index—the global assessment of the wellbeing of nations' citizens.

Across the Pacific Islands region, governments are routinely warned about indications of low student literacy levels, and there is much debate about what to do to redress the perceived issue in the numbers of children receiving a 'quality' literacy education, and achieving at 'expected levels'. Regional reports suggest that the status of literacy education is 'dire' with as few as 30% of students acquiring the literacy skills expected (Secretariat for the Pacific Board of Educational Assessment [SPBEA]), 2012; Pacific Regional Education Framework [PacREF], 2018). Commonly, basic skills for literacy such as phonics and fluency are recommended alongside ongoing teacher professional development and support. Policy reports position these basic skills as foundational, and also as determinant of future individual educational success:

> While provision of such basic skills forms the foundation for the future of our children, acquisition of these skills remains a huge challenge through-

out the Pacific. Studies conducted throughout the world have shown that pupil achievement in Literacy and Numeracy is a key determinant of student's educational achievements with those at the higher end of the Literacy and Numeracy achievement spectrum throughout the compulsory years of schooling likely to do better in further studies than those with lower Literacy and Numeracy achievements. (SPBEA, 2012, p. 1)

Despite much effort and resource over decades, these discourses have changed little. Regional and national literacy levels continue to be perceived as low. Regional tests monitor the success of initiatives and strategies across wide samples of students in terms of skills known to be associated with literacy achievement (PacREF, 2018). However, much less is known about the other dimensions that impact literacy learning, such as: understandings about what literacy entails, teachers' beliefs about literacy, teachers' knowledge of what students can do, practices in classrooms, and learning processes at school and at home (Wagner, 2017).

4   Defining Literacy

While an individual's level of literacy might determine their future educational achievements, the definitions of what literacy entails—as adopted by development agencies, governments, and teachers—will be important determinants of the literacy opportunities that children have over time. Those definitions shape both the experiences children are provided, and the expertise they are allowed to bring to literacy events.

Literacy can be conceived on a number of different planes (Fransman, 2005). A 'basic education' can be considered a fundamental human right (Lind, 2008) and literacy education commonly sits within this frame of reference. However, while the concept of literacy can be considered a basic skill, including decoding and encoding the sounds (phonemes) and words (lexemes) of language (Abadzi, 2016), its wider linguistic underpinnings should not be discounted (Bartlett, Dowd, & Jonason, 2014). So, any definition of literacy needs to encapsulate the notion that people use language for conveying, constructing and interpreting meaning (Wagner, 2011). Such a conception means that multiple forms of linguistic expertise enter the definition of what literacy entails.

Given that reading and writing are linguistic activities, they can be thought of as relying on a number of levels of linguistic expertise that arise from the use of languages generally. The work of linguists becomes important to consider for literacy (see for example Gee, 2004; Taufe'ulungaki, 2003). In the semantic

domain, readers and writers convey ideas or make meaning through language. In the syntactic domain, readers and writers express themselves through the grammars of their available dialects, registers, and languages, in ways that best convey the intended ideas. In the interpersonal domain, writers choose language carefully to position themselves in relation to the reader, and in relation to the content. Intentionally or not, the language that is chosen demonstrates the author's beliefs and attitudes to the topic at hand and to the perceived ideal reader of the text (Gee, 2004; Janks, 2012).

In the realm of education, the cognitive processes that underpin literacy are important for understanding how children might go about becoming increasingly literate, using an ever-increasing range of skills and drawing on an ever-expanding language competence. Hence, literacy is also considered a cognitive process, of thinking about, comprehending and composing, using language and texts (Clay, 1991).

Writers convey messages to readers. Readers consider the multiple messages that multiple writers convey, construct an understanding of those messages and interpret how that writer stands in relation to them and their stance. So, literacy is not only a cognitive process, it is also a social interaction, between at least two individuals (Rosenblatt, 2013). In society, however, texts function as much more than communicative events between two individuals; they construct and represent realities, and 'truths' espoused. In this way, literacy might be considered both a societal interaction, and a constructive process, determining what explicit and implicit realities are received and perceived (Gee, 2004).

Given these multiple functions, processes and underpinnings, literacy can be considered more than a 'basic skill'. I argue then for a wide consideration of literacy. Literacy is social. Literacy is language in action. Literacy is the way a society constructs truths, shares messages, learns, and disputes. Literacy is also high-level cognitive activity, as readers and writers mentally weigh, consider, challenge powerful ideas wielding the powerful tools of language, symbols and texts.

5 School and Home Literacies

It is well accepted that literacy development begins before children come to school. The concept of emergent literacy (Sulzby & Teale, 1991) acknowledges that children's literacy learning develops continually from a baby's initial interactions with others, through to extended oral language interactions that are a part of all children's home lives. Even the youngest children are therefore

always in the process of becoming more literate, and a wide range of experiences and expertise will build emergent literacies which might take a number of forms, including, for example, typical children's activities such as babbling, talking, singing, storying, (bickering and complaining), across potentially a number of languages, dialects or registers. These emergent literacies might also serve a number of functions, including seeking learning, understanding, interaction, communication, enjoyment and participation. And, given that literacy is a linguistic competence, children have communicative competencies and expertise which underpin written languages. They have knowledge, skills, understandings, and attitudes about literacy long before they encounter the processes of formal schooling. Children have been shown to have remarkable insight into the power of texts to shape what is received as 'truth' in official worlds (Dyson, 2003). Therefore, a variety of cultural tools, home languages, home dialects and registers, ways of participating, ways of thinking and ways of being, underpin any child's emerging literacies.

Alongside a wide variation in the types of literacies, there is also a widely accepted variety in ways of learning. Children learn through engagement in meaningful interactions with oral, written, and visual texts. They learn with, from and alongside peers. They learn by watching and eventually imitating people with expertise. Children learn by trying things out, by testing their emerging ideas, by problem solving. They also learn through discussion. Thus, language is what is learned in a literacy event and also the way of learning. Language is not only the underpinning of literacy expertise, it is also a vital component of how literacy is learned.

6   The Structures of Literacy Learning

As children transition into school they also transition into more formal educative structures where their activities are defined, extended, or constrained within the institution. School experiences ideally build from children's emergent literacies, in ways that are additive, that develop the multiple functions and forms of literacy widely conceived (Bronfenbrenner, 1992; Dyson, 2003). The corollary of this is that school experiences that subtract children's emergent literacies from their repertoires are likely therefore to be unhelpful or even harmful to their literacy development. In Pacific contexts disconnection between school and home lives has been the subject of critique (Thaman, 1999).

The experiences that children are offered in school frame the opportunities to learn at school. Development in literacy might be considered a process of 'bounded indeterminacy', shaped through "the organization of

person-environment relationships in everyday actions" (Valsiner, 1997, p. 169). According to this frame, the environment is structured through boundaries, set up by adults, which create 'zones' within which children develop. In this way, development can be characterized as 'channelled'—allowing for free movement, but within constraints imposed by what is allowed and what is promoted (McNaughton, Phillips, & McDonald, 2000). Generally, in classrooms, teachers create boundaries within which children participate; however, some of the boundaries are created by features of the context, such as curriculum expectations and resources. The boundaries include the definition of literacy that is promoted and the sorts of learning allowed. The boundaries also include the texts that students are asked to read, consider and respond to, as well as the texts that students author, and the sorts of thinking that children use these texts for, and the sorts of interactions that they have about those texts. All these literacy activities are bounded by notions of the purposes and definitions of literacy defined by curriculum statements, and teachers' beliefs about what students can achieve and what is important to learn.

As a broad generalization, I will argue that the main repeated finding from educational research is that with enough emphasis from adults, children tend to learn what they are taught. In the main, intervention studies typically claim success for target skills. The narrower those target skills, the more easily and quickly they are learned, and therefore the more 'success' that can be claimed by interventionists (Paris, 2005). However, such an approach to narrowing the boundaries for target skills runs risks. The first risk is that the target skills are not sufficient for literacy, widely conceived, as discussed above. The second is the risk of a subtractive set of experiences, that do not build from children's diverse emergent literacies, thereby impeding literacy development. Both risks challenge the validity of the intervention for the goal of literacy learning. These risks potentially explain the unresolved 'issues' of literacy learning in the region (SPBEA, 2012; PacREF, 2018).

In order to engage children in additive literacy learning processes in LALI and TLS, we needed to design a literacy intervention that could articulate with the learners, teachers, resources, institutional structures and curriculum documents, while still responding to different forms of emergent literacy expertise. The design-based research approach allowed the researcher-practitioner team to embed context specific understandings within the design. Given our conceptions, we faced a validity challenge. A valid literacy intervention would include a wide definition of literacy that encompassed linguistic, cognitive, social, and cultural functions and uses specific to the societies concerned. A valid literacy intervention would also conceive of literacy experiences that build from children's emergent literacies, adding to, rather than subtracting from, their knowledge of language in use, in oral, written and visual texts, again

differing by place. Literacy experiences would also add to children's language repertoires, learned through participation in language-rich experiences prior to school and at home. In LALI and TLS, we drew on the literacy expertise of 'knowledgeable insiders' (see Chapter 3) to co-design our response.

7   Nudging Conceptions of Literacy within an Intervention

The notion of boundedness offers insight into some of the conditions of literacy noted in our participating countries and schools. Survey results in the Profiling Phase (see Chapter 4) in countries showed variation in performance on a number of literacy indicators. For example, there was evidence of both the teaching and learning of 'basic', 'foundation' and 'pre-reading skills' of alphabet knowledge (Auckland UniServices Ltd. [AUL], 2015). However, while items of knowledge such as knowing letter names was established for the majority of children, tests also revealed that students were not uniformly able to use this knowledge to any literate advantage (i.e., for the benefit of actual reading or writing) (SPBEA, 2012; AUL, 2015). These patterns arguably explain the potential for a narrowly conceived set of skills to fail to add to children's emergent literacies, through inattention to languages, meanings or functions of literacy.

The notion of boundedness also sheds light on the opportunities that children have to learn literacy. A narrow conception of literacy development has the potential to narrow the experiences that children engage in. Potentially, this leads to classes where students have no opportunities to engage with text, or to engage with a book in their own language, or to engage with a foreign/second language book, by talking about it in their own language. It may also restrict opportunities to talk about texts that relate to their lives or to compose texts for their own purposes. It may also lead to the situation where successful learning in class requires increasingly fluent decoding of taught texts over time and copying or writing accurately the words used in the texts. However, to be a reader, one needs opportunities and strategies for tackling a new text using one's existing literacy repertoire and problem-solving strategies. To be a writer, one needs to turn ideas into written text, again using one's repertoire of resources.

Therefore, an intervention needs to consider widening the boundaries for students. Again, we were set a validity challenge. Our interventions needed to offer a more contextually valid definition of literacy and a wider, more contextually valid definition of literacy learning experiences. However, simply imposing a wider definition is not a strong strategy for building on existing repertoires. At initial co-design workshops, all research-practice partners agreed that part of our challenge was engaging with the beliefs and practices

of teachers and leaders, many of whom were already strong pedagogues, with experience or status as experts in schools and systems. We agreed not to impose external understandings but to weave, through relationality, our understandings of what we were undertaking (Veikune & Spratt, 2016) (see Chapter 7). Our approach was to use the strengths of the context, to ask how these might support literacy.

7.1   Case Study Example 1: Widening the Opportunities to Learn

In one context, the wider approach to thinking about what literacy entailed took the form of a focus on using letters, sounds and words to make meaning through writing. To write, children draw from their experiences, they write about people, places, and events that are familiar. They also draw from their existing language knowledge, and from their knowledge of encoding. Teachers support writing by sharing experiences with children and focusing on language and text. One of the approaches in the TLS intervention was to encourage teachers to engage children in writing a story about their experiences. To do so, children needed to compose using language, and encode using words or letters. Importantly though, they used language and literacy for social and meaningful purposes. They 'told a story' in written text. This comment from a teacher offers an illustration of the process of widening:

> In my Year 1, in Term 1, we did 'sentence build' and they started to write simple stories from then on. This term we are focusing on descriptive sentences and I get the children to focus on a story that has a beginning, middle and end. And now, they can write a simple connected story comprising three/four sentences on the basis of their experiences from home or school. I also take them on a field trip and they also write descriptive sentences from their experiences on the field trip. But I still provide link words for some of the children to connect their stories meaningfully.

In this example, the teacher describes how she has allowed students to begin to compose simple stories themselves. She has included focus on semantics and syntactics through her reference to descriptive language and to beginnings, middles, and ends. She has linked to students' event knowledge by extending the writing through field trips, and she has focused on building language and ideas with meaning.

7.2   Case Study Example 2: Widening Teachers' Repertoires

A wider conception includes allowing teachers to consider aspects of importance to them, as experts in context. For many teachers, children's attitudes to literacy and to learning were a key factor that they recognized as a driver of

literacy learning and of family engagement with school. In conversations with teachers and leaders in TLS, children's conceptions of literacy and enjoyment of learning literacy was a key focus. By engaging students in literacy activities that allowed them to bring expertise, teachers were able to also report on affective/intrinsic outcomes that they noticed.

In this example, the teacher showed her conception of the importance of motivation and enjoyment for literacy learning. Alongside motivation, the teacher noticed independence: children engaging in using the known to compose novel stories.

> …they are happy and want to explore new ideas and to learn new things. Even when writing stories, some of the children might start off by themselves without me prompting them.

An additive set of experiences for literacy learning includes an additive approach to teachers' roles as creators of learning opportunities. In TLS, the teachers' lesson designs increasingly incorporated a range of teacher-made resources, particularly given that reading resources were sometimes scarce, and difficult to replace. As this teacher described, at times it was necessary to think creatively about how existing resources could be used to build onto literacy experiences.

> Before TLS, I used some teaching aids but it depended on what resources the school could provide. But now I use whatever is in the environment to use in the classroom such as bottle tops, stones. I sometimes write words on stones, then ask the students to arrange them into sentences. I am now more creative with the materials I use in the classroom.

7.3   *Case Study Example 3: Widening the Text-Resource Base*

In addition to teachers using found materials to widen the resource base, the researcher-practitioner team also sought to nudge conceptions of literacy through developing text resources. Developing texts that could be used for multiple purposes and that incorporated local values, knowledge, and images were key drivers in deciding what texts to produce and how. Narratives and illustrations contextualized within each country contributed to high engagement with the books by students and teachers. The range of resources included the development of wordless picture books for LALI and TLS, dual language readers in LALI and Kastom-stori/non-fiction (dual epistemology) readers in TLS. Through co-design, the researcher-practitioner teams surveyed the types of resources already available and used in each intervention context,

to identify where additional types of texts might support the identified focus. These texts were then developed with specific contexts and aims with authors and illustrators from the contexts.

Wordless books are texts that were relatively easily developed, but which give teachers license to widen the literacy boundaries to support the focus. Within a writing focus in TLS, for example, the texts allowed children to invent stories which matched the illustrations. These texts could be written by children, or could be scribed by teachers. Conversations around illustrations could also provoke critical thinking and language development. In LALI, where the focus was reading comprehension, the wordless books supported the retelling, summary and analysis of text, for example analysis of cause and effect or understandings of characterization, setting and plot.

In LALI, dual language non-fiction books were developed. The books focused on significant Tongan cultural heritage stories that have contemporary relevance, and environmental themes of particular importance in the Tongan context. An example of the former is 'The Stone Clock', a text based on the Ha'amonga 'a Maui (Burden of Maui), also known as the 'Trilithon' because of the three stones that make up the monument believed to have been built between AD1300 and 1400. In 1967, the late King Tupou IV of Tonga suggested that the Ha'amonga 'a Maui was an ancient stone clock that shows the seasons of the year. An example of the latter, 'The Peau Kula Tsunami' is based on the devastation caused by a tsunami that hit the island of Niuatoputapu in January of 2010. The book recounts the stories of survivors of the tsunami. As part of the design-based approach, three types of dual language texts were developed: (i) texts where languages sat side by side on a two-sided spread; (ii) texts where there were two languages on each page; and (iii) flip texts, where the whole text is together as one language—each language having its own front cover, which the reader can 'flip' to read in the alternate language. In the co-design, the researcher-practitioner team were unsure which approach to dual language text would best suit the context. We decided to trial all three approaches, and get feedback from teachers and students.

In TLS, a similar co-design approach resulted in *Kastom-stori*/non-fiction texts. These were designed to acknowledge the existing strength of oral literacies in Nendo. Two local writers retold *kastom* stories, told to them as children, that provided local interpretations of scientific features. For example, in Hellen Marau's Medua and Tinakula, the *kastom* story of the creation of Tinakula, a local volcanic island is retold. The story intertwines themes of traditional village life and tribal relations and the relationship between humans and their environment, and accompanies this with the scientific explanations of volcanos. The stories use local knowledge, important in the *kastom* of Solomon

Islands, to explain concepts of interdependence between humans and their environment, helping each other, and scientific knowledge about animals, habitats, food, and survival strategies. The stories were illustrated by local Solomon Island artists, with particular attention to ensuring locally accurate depictions of animals, natural features, houses, and people, and ensuring these were accurate for the time period the book was set. The science behind the stories formed the second half of the readers. These were written as non-fiction texts, to complement the mostly narrative texts available to teachers at that time.

8   Conclusion: Beyond Basic

If literacy is social-cultural, textual, and cognitive, if it entails using languages powerfully to achieve important socially meaningful ends, then literacy is not a 'basic' skill. Instead, it requires high-level capabilities and expertise. Literacy teaching therefore is also not the imparting of basic knowledge. It requires building on students' current language expertise, not only in knowing language but in using it for purpose. To add to these emergent literacies, students need to draw from their cultural and linguistic resources and use them as tools for learning.

Our use of these conceptions as the basis for our research-practice partnerships meant that a quality literacy education needed to include the use of home languages, encourage children to compose based on their world knowledge, use home experiences and cultural meaning making systems as a basis for literacy learning, use found materials, engage community members, widen the sets of texts offered to include local languages, stories, songs and texts.

In weighing how we could add value within our interventions, we needed therefore to consider what we added to existing expertise. The following chapters take up this theme, highlighting existing expertise in mother tongue, in pedagogy and as a basis for assessment.

Learning, by definition, is additive. Narrowing the channels for learning, in subtractive ways, can never constitute quality.

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CHAPTER 6

Adjusting Language-in-Education Practices in Multilingual Societies: A Solomon Islands Case Study

Robert Early

Abstract

Solomon Islands presents a highly complex language situation with 71 recognized living vernaculars and an English-based creolizing pidgin, known as Pijin, as the major lingua franca. Although the first language of a growing population of younger speakers, particularly in urban areas, and despite functioning as a de facto national language, Pijin remains a significantly stigmatized language. English retains prestige status as the principal medium for official purposes and key functions like legislation, administration, education, and media, resulting in an enduring pattern of linguistic hegemony. English competency and literacy is regarded as the key learning outcome for all schools and all supporting mechanisms (curricula, classroom resources, assessment, teacher education and development) are operated in English only.

This chapter focuses on one aspect of the Temotu Literacy Support (TLS) intervention which took place on the island of Nendo, the main island in Temotu province. Drawing on prevailing understandings of language pedagogy in multilingual settings, which deeply support vernacular literacy and deliberate multilingual practices in the classroom (Cenoz & Gorter, 2017), the chapter reviews the current language policy and curriculum environment, and describes how vernacular literacy was incorporated into classrooms that were well-entrenched in an English-only system.

1   Introduction

Since Independence in 1978, post-colonial school-based literacy in Solomon Islands has focused entirely around English literacy. Recently however, the national policy environment has changed significantly, responding to widely accepted international understandings and modern practice around moth-er-tongue based multilingual education. But despite the international evidence that favors the use of a language that children know well for learning new skills, the prospect of moving beyond an English-only system has been opposed by those who consider that the main purpose of education is the development of English language skills. Teachers may struggle with the daily grind of firstly, teaching English, and secondly, teaching other subjects such as mathematics through English, to children who don't know the language and who seldom have meaningful exposure to it outside of school. However, many of these same teachers, will passionately believe they are doing the right thing. Such beliefs are reinforced by educational authorities and parents, who frequently view any inclusion of vernacular languages in education as a retrograde step. The national level policy changes have so far had very little trickle-down impact in the classrooms of the nation, and there are evolving views and varying practices regarding how early-grade literacy is, and should be, taught.

As a Melanesian country, Solomon Islands presents a highly complex language situation. There are 71 recognized living vernaculars, 16 of which are classified as significantly endangered (Simons & Fennig, 2018). The average size of each language is around 9000 speakers (Early, 2007). An English-based creolizing pidgin, known as Pijin, is the major lingua franca, and this is also the first language of a growing population of younger speakers, particularly in urban areas. Despite functioning as a de facto national language, Pijin remains a significantly stigmatized language. English retains prestige status as the principal medium for official purposes and key functions like legislation, administration, education, and media, resulting in an enduring pattern of linguistic hegemony. In such a multilingual context, high levels of individual multilingualism prevail, with the prototypical Solomon Islander being able to speak their own vernacular, plus Pijin, and some level of English.

Despite the elevated role given to English in education, and the ongoing commitment to achieving English language outcomes, the widely-recognized reality is that, especially in early-grade contexts across the Solomon Islands, teachers make significant use of students' first languages and/or Pijin as a means to at least ensure that a common code of meaningful communication is in place. In many situations, as observed in schools on Nendo Island in

Temotu Province, this leads to a form of diglossia whereby the bulk of class-room oral communication is largely in L1 or Pijin, and all written communication by teacher or student is in English. This means that students must learn to read and write a language they seldom hear or speak, while not learning to read or write the language they can speak well. It is surprising when educators appear to be at a loss to explain why the overall outcomes delivered under this approach fail to meet acceptable national performance benchmarks.

This chapter will review the current policy and curriculum environment, and look at features of how this is, or is not, being implemented in some schools on Nendo, the main island of Temotu province, one of the more remote in the Solomon Islands. Attention will be given to features of a recent intervention, Temotu Literacy Support (TLS), which attempted to insert elements of L1 literacy into classrooms that were well-entrenched in an English-only system.

2   National Policy Framework

In recent years, a review of language-in-education policy has resulted in high-level formulations which strongly promote the concept of mother-tongue based or vernacular education for the early years, with gradual transition to English as a language of instruction from Year 4 onwards. The use of bilingual approaches in classrooms is envisaged, so that the strong foundations of first language (L1) literacy established in Years 1 and 2 can lead on to a gradual development of English language learning and literacy. Ongoing maintenance of the use of L1 ensures there is no sudden or rapid exit from the support that the first language can provide for learning, even as English becomes the predominant language of instruction in higher grades.

The strong foundations of vernacular education begin earlier, at the pre-school level. Clear directives designate the vernacular to be the predominant language of interaction and learning in early childhood education contexts (Ministry of Education and Human Resource Development [MEHRD], 2008), and many advances have been made at this level (Glasgow, Ha'amori, Daiwo, & Masala, 2011). The pre-school curriculum (MEHRD, 2009) emphasizes the use of vernacular languages in the pre-school and sees early childhood education as a key strategy to strengthen local languages and support indigenous cultures.

A formal document containing the national language policy for education has been issued (MEHRD, 2010b), which recognizes that initial literacy is best taught in a vernacular (which may include Pijin), but that English is an official language and the main language for higher education. Its two-pronged vision is that:

[4.1] All Solomon Islanders will learn to speak, write and read in their mother tongue, and the use of our local languages will help to promote literacy and educational achievement in all sectors of our community.

[4.2] Students will learn English to a level that equips them to make choices for taking up study or employment opportunities…at home and abroad.

The language policy fully understands key features of the vernacular education approach, and contains important guidelines for how multilingual outcomes are to be accomplished, such as:

[6.5] Students develop a high level of competence in vernacular literacy before being introduced to literacy in English.

The policy endorses the established understanding that the longer students learn in and through their vernacular, the better they will eventually learn in English assuming that factors like teacher quality and resources are in place.

One startling feature of the language policy, however, is its disinterest in dealing realistically with the modern role of Pijin in Solomon Islands society and schools. It is not uncommon for educators and others to shy away from affording legitimacy to non-standard or stigmatized varieties of language, especially where they appear to be growing in both functionality and vitality. It is useful to compare this aspect of Solomon Islands language policy to that of the neighboring Melanesian and linguistically complex country of Vanuatu where the local pidgin is known as Bislama. Bislama was once similarly discounted (Lynch, 1996), but in recent times it has blossomed as the national language with a significant role in education; for example, as the language of teacher guides. In Solomon Islands, however, Pijin has not developed in this way, and while it is conceded that Pijin has creolized as the first and possibly only language for many, its role as the largest and most widely used language in the country is obscured. This understanding of Pijin's L1 status and role is widely shared, but is not verifiable from the 2009 Census data which, although referring to "language ability" (Solomon Islands National Statistical Office, 2009), is in fact measuring literacy, with similar percentages of the population claiming to be literate ("can read and write a simple sentence") in English (69.0%), Pijin (66.6%), and local language (61.0%).

There are only six mentions of 'Pijin' in the language policy document. One mention is to accept that Pijin is a first language for some. Three mentions are in the glossary, describing Pijin in general terms as a pidgin or creole

language. The other two mentions are in the context of outlining the language situation of the country. There is no mention of Pijin in relation to classroom learning, despite the wide acknowledgement that it is the language (if not the vernacular) that students are most likely to hear at school, as was observed in Temotu schools. It is the language that teachers will default to in peer communications, including formal staff meetings, planning sessions and professional development.

This lack of acknowledgement of the significant role that Pijin already plays in the classrooms of the nation (for better or for worse, in different points of view) is notable. The determined avoidance of any consideration of the role that Pijin could have as a potential medium for school-based learning, or nation-building, reflects prevailing negative attitudes and misconceptions about Pijin, such as that it is just 'broken English', or that it has negative effects on the learning of 'proper' English. Major shifts in perception at societal and political levels will be required before the Pijin 'elephant in the room' issue can be addressed and dealt with for beneficial outcomes.

Another important policy document is the National Literacy Policy (MEHRD, 2013) which is intended to support implementation of the language policy. It includes the provision that:

> [3.2] The government encourages a 'literacy for all' approach…every individual…should be provided the opportunity to be literate in his or her indigenous language and in English.

and that:

> [6.2.1] MEHRD must use the Vernacular Policy to guide decision-making about the appropriate language of instruction in schools.

Apart from the point about Pijin, this overall language policy framework is well-motivated and ideal, in that it reflects the key concepts and concerns of modern multilingual education approaches, ensuring a solid and continuing basis in L1 literacy with ordered addition of an L2. Once this policy was in place, MEHRD decided to undertake two pilot vernacular education projects, with the support of international advisers. These incorporated full implementation of 'best practice' vernacular literacy methodology, with significant resources and teacher training. Informal observations from these projects indicate highly positive results and outcomes. Although at least five years have passed since then, a formal review of the pilot projects is yet to be undertaken, and it is possible that earlier momentum in favor of vernacular education has

dissipated. Nevertheless, in the Education Strategic Framework (2016–2030), MEHRD is already committed to mainstream and upscale the adoption of vernacular language education.

In terms of Hornberger's (2002, 2005) analysis, the top-level policy framework provides ample ideological space, and the prospects of implementational support, for multilanguage education to flourish. However, an optimal multilanguage implementation requires many facilitating considerations to be in place, from high-level policy direction to teacher quality, to pedagogy, to teaching and learning resources, to the classroom environment and children's readiness for learning. When these factors align, good learning outcomes in two or more languages are widely reported. But what are the possibilities where potentially necessary conditions are missing? Even where policy and implementational concerns are in order, other factors may overturn any guarantees of success. In regard to Vanuatu, where recent policy changes appear to have created a promising new implementational space, Willans (2016) still suggested that the timing was not right for a multilanguage education project to be undertaken.

3   The Curriculum Framework

The current national curriculum guides teachers about what is to be taught, with the key element of primary education being to "develop the essential basic skills of reading, writing, speaking and listening" (MEHRD, 2010a, p. 11). Some direction on how to teach the curriculum is provided, but there is a puzzling lack of guidance regarding language of instruction. It appears that language policy was still under discussion as the curriculum was being prepared, so teachers are simply informed that a "policy on the use of the vernacular as a medium of instruction in early primary schooling is being developed" (p. 17). This is the policy already discussed (MEHRD, 2010b), which provides rationale for a bilingual approach whereby "teaching will be done in two languages, vernacular and English. Both are to be used as languages of instruction (LOI) in the learning process at the appropriate times. The teaching of vernacular languages will strengthen student understandings and performance in English" (foreword by the Minister of Education, MEHRD, 2010b, p. 3).

4   The English Syllabus

As at the time of writing, there was no separate language or literacy component in the primary learning areas, so all proposed language learning is covered in

the English syllabus. As expected then, the focus of language instruction in the primary years is the acquisition of English language and literacy. There are various points at which the importance of L1 as an auxiliary or support language is recognized, and even encouraged. For example:

– For the first three primary years, "there is an explicit and focused link between English and the other languages. Known languages are used to make the bridge into English. Teachers will use bilingual approaches to support strong learning of spoken English" (p. 6).
– In developing "the most appropriate strategies for learning, teaching and assessment of English in the Solomon Islands, the most important consideration is that…English is a second, third or fourth language,…the strategies selected…must be those similar to foreign language methodology" (p. 10).
– In the prescription for the oral strand of Year 2 English, one outcome is that students will "retell personal experiences and community events, sometimes with support from languages other than English" (p. 30).

It is also acknowledged that some level of comparative multilingual awareness is of value, so that one anticipated outcome is that students will "recognize the links and differences between various languages—in Solomon Islands and more widely—in order to understand the way English is structured and how English is used" (ibid.).

The syllabus is aware of content and language integrated learning, noting that for "learning in the classroom to be integrated and meaningful, teachers (will) make links between English other subjects. Learners' learning and progress in other subjects depends on their ability to understand and use English" (p. 12).

Good understanding of international findings regarding multilingual education is evident, with reference to key authorities (Cummins, 2000; Thomas & Collier, 2002), and important conclusions are drawn: learners take many years to become proficient academically in a second language; Solomon Islands learners will not progress in English at the same rate as those who are monolingual English users; and teachers must make links to the languages that learners bring to the classroom, showing learners how language works and how English works.

There has also been some movement in regard to resources, so that the upgraded version of the graded readers (Nguzunguzu series), distributed to schools in 2017–2018, contains advice and suggestions for teachers regarding bilingual strategies that could be employed with the English language readers.

These factors suggest that the syllabus was put together by curriculum writers who were fully aware of the advantages that a full vernacular education approach would offer but were constrained by the English-only policy that was in place at the time. Consequently, no support, guidance or direction is given

to teachers in regard to the acquisition of L1 literacy, or to the active use of L1 as the key language of instruction in the early grades.

This leads to a significant perturbation in the messages that flow through to classroom teachers. While there has been noteworthy advance in top-level policy formulations that now support vernacular literacy and multilanguage education, teachers are still expected to comply with the teaching requirements and assessment regime of the existing English-focused curriculum framework.

5   The Temotu Context

Initial steps of the Temotu Literacy Support intervention involved in-depth profiling of the targeted schools (see Chapter 4), including student assessments, teacher and head teacher interviews, and classroom observations. The information obtained was carefully interpreted in workshops with local stakeholders, and targeted interventions were co-developed. An in-depth sociolinguistic survey of students and teachers was also conducted, which investigated the following areas:

– What languages are known and used (in what context) by teachers and students?
– What factors might impact on the viability of utilizing languages other than English as teaching languages?
– What beliefs and understandings exist in regard to classroom language usage?

This information shed light on how to respond to the challenges of the linguistic context, as expressed in the following questions:

– Should children be taught mother tongue literacy first, as envisaged in policy, or in English, as prescribed in the established syllabus?
– If the mother tongue is taught first, how should English literacy be introduced? If English remains as the first language of literacy instruction, could some inclusion of vernacular literacy support that?
– The community and student population are already bilingual or multilingual, so what kind of classroom practices and teacher language choices will be most supportive of student learning?
– What are the resource considerations of any decisions made?
– How should other implementational considerations be addressed, especially teacher quality and professional development, and teacher placement?

Some of the key findings from the profiling and survey efforts are now described.

5.1 Schools and Languages

There were eleven schools where a single vernacular language predominated, with more than 70% of children being first or second language speakers of the school community language. Six schools were in the Natqgu language area, where a previous church-based literacy program had successfully built a level of community vernacular literacy, four schools were in the Nalrgo language area, and one was in an Äiwoo speaking community. These schools presented a promising scenario for the vernacular approach. There were two schools which could be described as mixed vernacular, with over 50% of students speaking the Taumako-Vaeakau language, but also significant numbers of Natqgu or Äiwoo speakers as well. In these schools, children tended to speak Pijin to each other. Then, in the main provincial center, Lata, there was a further primary school with around 40% of children speaking Natqgu, but the remainder were from multiple other vernacular or Pijin backgrounds.

5.2 Teachers and Language Knowledge

There was limited mobility of teachers, and most were active speakers of the vernacular of the school community. This was not a result of deliberate teacher placement, but an unexpected benefit of teacher shortage leading to many early grade teachers, untrained and unqualified, being simply co-opted from the local community.

Teachers displayed high levels of multilingualism. Every teacher knew Pijin and English and one or more vernaculars, with 54% speaking one vernacular, another 29% speaking two vernaculars, and a further 17% speaking three vernaculars, making a total of five languages spoken by each teacher in this last group.

5.3 Teachers and Educational Language Policy

Teachers had little understanding of the current MEHRD policy framework for language education. Over 93% of them professed no knowledge, or to not having been informed, of what the policy states. Erroneous perceptions about what the policy might say were common. With regard to Pijin, 51% of teachers said that the policy "allows" its use, 40% said that the policy "stops" it, and only 9% thought that the policy "supports" it. For the vernaculars, 45% said that the policy "allows" their use, 40% said that it "stops" this, and 35% said that it is "supported".

Overall, many teachers (40%) believed that policy prohibits the use of Pijin as a teaching language, which is not true, and more teachers (65%) thought that the policy does not support the use of the vernacular, which it does.

5.4   *Teachers and Beliefs about Languages in Education*

Despite being unaware of the new policy directions, teachers believed that it would be beneficial to actively use first languages as languages of instruction. Their own experience as teachers exposed them to the impact of the pedagogical, social, and cultural underpinnings of the mother tongue approach. Along with this positive view of vernacular education, teachers also strongly maintained that the key output of the education system should be students with high levels of English language skills. They displayed a wide range of views about the order, timing, and progression of how students should learn L1 and L2, and how each language should function as a language of instruction.

5.5   *Students and Language Knowledge and Skill*

Like their teachers, students in primary schools generally speak the vernacular language of their community as their first language. The larger languages (Natqgu, Äiwoo, and Vaeakau-Taumako) appear to be strong, although inroads of Pijin and some language shift are detected and referenced in community discourse. Students also display high levels of multilingualism, reflecting the communication patterns of their communities. Students who speak a vernacular as a first language will usually also know Pijin. Less than 20% of students did not know Pijin.

The overall picture that emerges from the teacher and student profiling and survey data was that the conditions were ripe for a greater and more formalized inclusion of mother tongue instruction in the majority of the schools.

5.6   *Community Perceptions*

Before any vernacular literacy activities began, community consultations were held, including both community and school leaders and members. Presentations were given that built awareness about the multiple positive impacts that vernacular education approaches have been shown to deliver elsewhere, and information was provided about national policy developments. Once participants understood that the language conversation does not devolve to a forced choice between local language or English, that all languages have value as tools of learning and communication, and that strong foundations in L1 learning and literacy should lead to improved outcomes in English learning and literacy, there was a unanimous response. Enthusiastic support was given for teachers to incorporate local language literacy in early education, and for first languages to promote and support classroom learning.

One narrative from these workshops relates the experience of Kennedy. As a young person, Kennedy did not do well at school, and was so deeply troubled at being punished for speaking his own language in the classroom that he

dropped out of school. Later, he became a lead literacy trainer in the church-based vernacular program, and a respected community language expert. Many years later, as teachers became interested in vernacular literacy at school, the one thing that troubled them was their own lack of skill in this area. They had previously seen no value in becoming literate in their own language. In an amazing about-face, Kennedy was called back to the school, to train the teachers, who had previously punished people like him for using their language at school, in how to teach these children to read and write their own language. This was an emotional moment for all and signaled the beginning of a new kind of collaboration and cooperation between the school and the village community.

6 Intervention Response

Building support for the use of vernacular languages in the intervention schools took time, and only a limited number of steps could be taken to implement this in the life of TLS. Nevertheless, small-scale advances were highly regarded by teachers as making a significant difference to student learning and are considered to have contributed to the learning gains that were identified from the assessments that were conducted as the intervention came to an end.

One key activity was to develop resources to support L1 literacy. These included workshops that made some refinements to the alphabet, and that developed posters of the alphabet, and of the alphabet song. A volume of graded stories from the previous community literacy project was upgraded, revised and distributed, and several English Nguzunguzu readers were translated into the vernacular, and printed with the same colour illustrations. Alphabet cards, high frequency word flash cards, and other materials were prepared for eventual printing and distribution beyond the timeframe of the project. The linguist previously involved, Brenda Boerger, was able to provide further valuable support. Workshops were held for teachers to become familiar with these new resources, and to share ideas on activities that could utilize them.

TLS also provided an intensive program of workshops and in-school follow-up mentoring that supported the teaching of English literacy and the wider curriculum. However, a strong thread in these workshops supported the use of the first language. A large inventory of literacy strategies was developed, and teachers explored bilingual applications of these, with the goal of enhancing skill levels in both languages. One further resource that lent itself particularly well to bilingual strategies was a number of wordless books.

The most difficult area was for schools to determine how to incorporate the vernacular component into their teaching program. Teachers were conflicted, on the one hand believing strongly that they should introduce vernacular literacy, but on the other hand, feeling administratively bound by the regimented and timetabled requirements of the English-based curriculum. A variety of local solutions were explored, such as adding on an extra time slot at the end of two days per week (with other community members invited to participate), or manipulating the set timetable by alternating on a daily basis between L1 and English, or partially subverting the system by focusing on L1 literacy with the hope that it would eventually result in improved English literacy skills anyway.

Schools developed vernacular language writing and speech competitions and included presentations of vernacular work and performance at school assemblies and other venues. Teachers from higher grade classes were so interested in the enhanced learning that was taking place that they participated in weekly professional development sessions with the junior primary teachers where new readers and other teacher-created resources were produced. Levels of excitement among teachers and the community were high, largely resulting from the simple realization that the classroom doors had been opened for their own language to play a significant role in their children's education.

The value of the impact of this new approach on students' lives and well-being cannot be underestimated. Temotu Province was not impacted as greatly as others, but current primary school cohorts have lived all their lives through a period of ethnic conflict and tension (Maebuta, 2012). Teachers face significant challenges arising from remoteness and resource constraints, and school program are too readily disturbed by land disputes, and conflicts over logging and mining. Poverty is an issue for many families, particularly internal migrants. Exposure to stressors like conflict and poverty can negatively impact language stimulation, parental responsiveness, and cognitive development (Shankoff, 2015, p. 126), so it is even more important that children's first school experiences are supportive and affirming of their language identity, rather than alienating and confronting through the medium of a second language that they do not know. Teachers were able to report that as the vernacular literacy element became more established, students were responding with improved levels of attendance and engagement, and teachers themselves enjoyed a new sense of achievement and success.

Modern understandings of language pedagogy in multilingual settings now deeply support vernacular literacy and deliberate multilingual practices, such as translanguaging, in the classroom (Cenoz & Gorter, 2017). Teachers in Temotu still have a long way to go in their understanding of how to foster multilingual development in their teaching, and there are still unresolved issues, such as the extent to which assessment practices should also reflect the dual

language approach. However, in the course of a short time, the inputs of the Temotu Literacy Support intervention have helped many of them to make a good start in incorporating vernacular literacy into their primary level classrooms, in a context where the system is still driven by the demands of the English curriculum.

7 Conclusion

The contextual differences between a group of small remote schools in the south-west Pacific Islands of Melanesia and the educational setting of a large urban United States school district are so great as to be almost beyond imagination. However, Johnson's (2010) analysis of Philadelphia educators engaging in their own local language policy creation to occupy the space left by gaps in the national U.S. language policy for developmental bilingual education draws remarkable parallels with the situation in Temotu. There is a common dynamic at play, so that "spaces for bilingual education are pried open by a community of educators who fostered an ideological space which supported multilingualism as a resource for all students" (2010, p. 61). Both in Philadelphia and Temotu, this process leads to "the empowerment of bilingual teachers to take ownership of language policy processes and appropriate language policy in a way that benefits bilingual learners" (2010, p. 61).

It is to be hoped that the admirable intentions and aspirations of the Solomon Islands' national language-in-education policy will eventually be supported with required curriculum reform, resource development, teacher education initiatives, and school-based learning support processes, so that there will be a seamless and strong flow of ideological and implementational impetus all the way down into even the most remote classrooms of the nation.

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Pedagogy and Relationality: Weaving the Approaches

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Abstract

Many educationists from the Pacific and elsewhere have drawn attention to the need for comparative educationists and those active in shaping international development discourse to abandon universalist assumptions of knowledge, teaching and learning. They recognize the depth and diversity of epistemological understandings upheld by indigenous education communities and their pedagogical implications. They call for the development of pedagogical models that move beyond the teaching practices upheld in the global north, and that demonstrate an understanding of how teachers' beliefs, values and practices are shaped and informed by the cultural contexts in which schools exist. A particular concern increasingly expressed is the persistence with which pedagogical reforms promoted by the global education agenda of recent decades assume a pedagogical binary between 'teacher-centered' and 'student-centered', and the extent to which so-called developing countries are urged to abandon the former in favour of the latter in order to improve student learning outcomes.

In this chapter we highlight the ways in which researcher-practitioners involved in literacy improvement interventions in Pacific Islands countries moved beyond the notion of such a binary. Explored are the processes of co-designing pedagogical approaches aimed at improved literacy teaching and learning and the extent to which these required close attention to a range of cultural and contextual considerations.

Keywords

teaching – learning – knowledge – epistemology – indigenous – *talanoa* – dialogic – culture

1 Introduction

This chapter's attention to pedagogy is central to the themes of 'relationality' and 'learning' and to the key line of argumentation that epistemologies indigenous to the intervention contexts should have a crucial role in the transformational teaching and learning processes being sought (see Chapters 1 and 3). The strengths-based approach underpinning the interventions includes the understanding that pedagogical improvement means building from existing beliefs and practices about teaching and learning. The epistemological understandings upheld by school systems, leaders and teachers, and the expectation that the pedagogies these understandings imply will enable them to meet their country's educational goals and objectives, are recognized as deeply embedded.

The research-practice team engaged in the interventions, therefore, understood pedagogy as more than teaching technique; rather pedagogy was accepted as a moral and purposeful activity based on important values and ethics shaped and informed by the socio-cultural context in which schools exist. Also understood was that because 'culture' is what gives meaning to school life (Alexander, 2001) so it must be central to education research-practice. Of particular resonance to the intervention team's exploration of a contextually and culturally relevant pedagogical approach was Alexander's explanation of pedagogy as, "the crucial point at which culture, history, policy and ideas about education come together as observable action and felt experience in the classroom" (ibid., p. 7). Of further interest is the call for more research on learning itself, on what actually happens in classrooms, in order to develop a pedagogical model that takes into account that schools and teachers practices are informed by deeply embedded socio-cultural environments as well as institutional norms and structural conditions (Tabulawa, 2003).

Another matter of debate informing the research-practice team's attention to the pedagogical knowledge and skills required to improve literacy teaching and learning, was that of the often-assumed binary between 'teacher-centered' and 'student-centered' classroom approaches. Despite a significant research literature demonstrating this as oversimplifying the complexities of teaching and learning environments (e.g., Barrett, 2007; Schweisfurth, 2011), of concern is the uncritical endorsement by many international development agencies and actors that 'developing' countries should abandon the former in favor of the latter. Of particular interest to us was the work of Guthrie (2011), an Oceanic educationist whose research is specifically informed by his work in Pacific schools and classrooms. According to Guthrie, teacher-centeredness should not be seen as an intermediary step to student-centeredness; rather it is

central to many developing countries' school systems because of its compatibility with both traditional and contemporary cultural practices. Therefore, he maintains, teacher directed learning should not be considered a problem readily fixed through external assistance, "but a deep-rooted cultural behaviour capable of playing an important role" in the further education development of those systems (ibid., p. xxviii).

Guthrie's highlighting of the need for research into processes of working with existing pedagogies in order to discover the contextual implications for improving them, rather than trying to replace them, leads us to McPhail's notion of 'mixed pedagogies' (McPhail, 2013). He emphasizes the need for those driving pedagogical reform to acknowledge that pedagogy is more than a simple binary, or an unproblematic progression from teacher-centered to student-centered classroom practices. His mixed pedagogy approach is based on the selection of certain elements of both teacher-centered and student-centered approaches. Rather than try to replace one approach with another, he proposes that the mix of elements from each approach is improved by building on what already exists within a particular context (McPhail, 2013, p. 122).

Thus, for our research-practice team, working with school leaders and teachers to develop the pedagogical knowledge and skills for improved literacy teaching and learning required attention to a range of contextual and cultural considerations. Moreover, it required 'mixed pedagogies'. Using a metaphor of weaving (Veikune & Spratt, 2016), culturally informed dialogue through *talanoa* (Vaioleti, 2016) and the notion of dialogic pedagogy (Alexander, 2006), empirical investigations into processes of teaching interactions and student learning became the basis of an exploration into the development of contextually based pedagogies.

2   The Pedagogies of *lālanga*: An Example from Tonga

The *Lālanga* (mat-weaving) metaphor was developed to help explain and describe the activities in the program and to explore the process that many Pacific children employ to learn many things. Weaving is the intricate maneuvering (skilled and otherwise) of plant fibres/textiles so that a mat is achieved, and in the Pacific, it is mostly the interlacing of *feʻunu* (strips/strands) of pandanus, in a straight line running the width of the mat. The weavers select the strongest strands to begin the *fatu*, the first row/run of the mat. Only skilled weavers start the mat because that first run determines the straight line of the mat and ensures the right tension is sustained so that the mat does not unravel. The second row is called the *hala fakamaʻufatu*, translated as 'the run

that binds/makes stronger'. It is supposed to hold the first row in place and further ensures the mat will be a strong one. Novice weavers watch the weaving and might be allowed to weave small portions while the skilled weaver looks on and monitors. As the mat advances, and the weavers get more confident, they begin to add new strands and make innovations, they begin to make sense of new or acquired knowledge, so that the acquisition of new knowledge becomes almost seamless and, therefore, less stressful for the learner-weaver.

The *Lālanga* metaphor is discussed here for two purposes; one is that the *Lālanga* metaphor symbolizes the work that was done during the interventions from a relational perspective. Two, is that the *Lālanga* process itself, is analyzed to illustrate a particular pedagogical approach situated within a particular socio-cultural context.

3   *Lālanga* as a 'Mixed Pedagogy'

The strengths-based approach taken by this program was based on the understanding that to improve pedagogy was to build from existing beliefs and practices about teaching and learning. And while the classroom-based research offered detailed descriptions of observable teaching practices and student learning, Alexander's call for attention to culture, encouraged the team to also look to the socio-cultural context that embeds the classroom practices. The *Lālanga* process itself illustrates to some degree Tongan beliefs about ways of knowing (epistemology) and how we learn and teach others (pedagogy) about the art of weaving. The *Lālanga* as an act illustrates a pedagogy that is more than the technique of teaching weaving; the *Lālanga* is also a pedagogy that is built on moral and purposeful activities based on the important values and ethics of Tongan society. In this sense, *Lālanga*—as a relational act and as a pedagogy—honors Tongan relationships and communal obligations.

The *Lālanga* also has strong synergy with the Tonga Curriculum Framework (TCF) (2011) which, based on research undertaken by Taufe'ulungaki, Johansson-Fua, Manu and Takapautolo (2007), articulates how Tongan students *ako* (learn) best: through *fakafanongo* (listening), *siofi* (observation), akoako *ngāue* (practice) and *ngāue'i/tā* (performance). In teaching, the teacher (*faiako*) firstly demonstrates (*fakatātā*), followed by practice with the students (*kaungā ala*), then students will be monitored and evaluated (*fakatonutonu*) after which they will perform (*ngāue'i/tā*). The emerging pedagogy identified by Taufe'ulungaki et al. (2007), which now guides teachers' delivery of Tonga's official curriculum, closely aligns with the *Lālanga* as a 'mixed pedagogy' insofar as it speaks not only to the student's learning but also the teacher's approach. There is

attention to both teacher-centeredness and student-centeredness. Moreover, central to writings by Tongan academics (Johansson-Fua et al., 2008; Thaman, 1988) on what education means and entails, is the deep and creative engagement with the words associated with education: *ako* (learn) *poto* (skill) *'ilo* (knowledge) in all its forms, meanings, connotations, and nuances.

Fusitu'a and Coxon (1998) refer to the concept of *poto* as the ideal of an educated person as both a thinker and one who could apply knowledge in practical ways. In Helu-Thaman's (1997) words, such a person is one "who knew what to do and did it well... who used *'ilo*, knowledge, in ways deemed to be beneficial to the collective good of the family, wider community, or the nation" (p. 122). Further explained was that although the traditional notion of *poto* changed under 'western' influence, with less emphasis on the practical application of abstract knowledge, the work of Tongan educationists was leading to a re-evaluation of the notion of *poto* with reference to the educational model upheld by King George Tupou 1 (see Chapter 2), who recognized no necessary contradiction between Tongan and 'western' educational forms and practices. The adoption of one did not mean the exclusion of the other; one was not a substitution for the other or superior to it.

The Literacy and Leadership Initiative (LALI) gave us the opportunity to explore the multi-faceted process of *ako* (learning), especially enabling school principals and teachers to engage with their school data (classroom observations, student achievement). The Talanga Laukonga process (see Chapter 3) provided parents the opportunity to *talanoa* about their home literacy experiences and learn about the activities which could enrich their child's classroom experience. The overall LALI process allowed principals and teachers to collaboratively *ako* (learn), so that they would *'ilo* (know) more about their schools and their students and, in the process, use that *'ilo* (knowledge) and *poto* (cleverness) to make well-informed plans about literacy. The weaving exercise was an enriching experience, made rich because of the engagement of weavers at all levels of the educational experience, and the use of context-specific resources and knowledge to build into the learning of the new without abandoning the old.

4   The Observable Acts

In maintaining that pedagogy in general requires teachers to make decisions on a wide and flexible array of skills and knowledge situated within relationships, beliefs and theories, we are drawing on a further statement of Robin Alexander (2009) that,

> Pedagogy is the observable act of teaching together with its attendant discourse of educational theories, values, evidence and justifications. It is what one needs to know, and the skills one needs to command, in order to make and justify the many different kinds of decisions of which teaching is constituted. (p. 5)

Teachers work on theories of what students know and need to know; based on deep understandings of the focus and content of the learning they collect or build a bank of resources to support the learning, and consider how students are progressing in their learning, and adjust or adapt accordingly. Ultimately, flexible enactment of pedagogies will require expertise and knowledge in being able to weave such extensive repertoires into daily opportunities to learn in order achieve the outcomes that are desired for the students. Pedagogy, therefore can be considered as decision making; as the weaving of repertoires based on theories and knowledge within the specific context. Effective pedagogy is the selection and combination of the repertoires in ways that best support learning.

From the outset of both the interventions central to this book, it was apparent that some approaches to literacy pedagogy were more visible than others in the classes that we observed. Our approach therefore was to acknowledge existing foundations of strength. Based on teachers' and leaders' contributions and feedback the research-practice team was able to discern what was valued and what was known already. From these starting points, we were able to discuss collectively which directions could build from these existing strengths. Our talk sought to understand new applications of these resources to respond to the patterns of student strength and need. The approach was one of weaving the pedagogic mat from the threads of teachers' and students' strengths. As such, the approach was intended to harness the cultural, social and cognitive diversity across countries, schools, leaders, students and teachers.

The research-practice team used a classroom observation tool to record observable acts. This tool was co-designed by members of the research-practice team from the three countries concerned. Our deliberate efforts to weave the combined knowledge from across the Pacific Ocean through talk began with providing space and time to design and critique the classroom observation tool that would help us understand literacy teaching and learning practice in classrooms.

When learning to read and write, students need to orchestrate a number of key challenges. They need knowledge of letters and sounds. They need knowledge of words, and how to say them and spell them. But reading (or writing)

goes beyond the encoding of sound to text. Students also need vocabulary knowledge, they need to comprehend what they read, they need to know whether or not they have comprehended, and they need to deepen their understanding or consideration of something through considering what if anything this new information adds to their existing knowledge base. In writing, they need to have good ideas to write about, knowledge of language and text structure to express those ideas clearly and of how to choose and combine language in ways that best expresses the intended message.

In the early phases of the LALI program, classroom observation data revealed that teachers in the classroom tended to focus on literacy areas that were discrete skills or items of knowledge. Such discrete skills included areas such as single letter and single word items, either read or written. Fundamentally, knowing letter sounds and being able to identity letters and words is important in learning to read and teachers demonstrated facility with developing these skills. From this firm basis, we were able extend the content focus to higher order cognitive processes, such as reading longer, more varied texts, and engaging in *talanoa* to further think critically about and thus comprehend what was read.

The tool also provided a snapshot of the approach taken in lessons. There are many ways that teachers might choose to present a lesson or engage students in learning, and a number of key approaches were observed.

– A straightforward way to present new information was the direct teacher-led approach of telling students the information (*fakatātā*). This approach is well suited when the knowledge is formally described and new to learners. On our observation tool, we described this as 'lecturing' or 'telling'.

– An approach similar in form to lecturing, but having a different purpose, was modelling. In this approach, a teacher might 'show' students how to go about achieving a task. An example of modelling was when teachers 'think aloud' about the thoughts and problem solving processes that they were using as they tackled a challenging task (for example, a teacher might say "I'm going to look for the key words in this passage to get a good idea of what it is mainly about").

– Practice (*kaungā ala*) is an important part of literacy learning. A key approach that supported practice is repetition and recitation. This approach was well suited to learning something to the point of overlearning – when automaticity and speed of recall was required.

– Sometimes teachers supported students while they were engaged in a task. This approach relied on the teacher giving assistance to students who are having difficulty, redirecting students who have gone off track, or ascertaining how well students have understood (*fakatonutonu*). The approach often

takes the form of 'roving', moving around a class, checking in with students, pausing briefly to confirm, redirect, praise, offer a key piece of information, and informally monitoring the students' success. This approach is suited to tasks that are mostly within the students' reach and may just need a small amount of input from the teacher.

– Questioning was also apparent in the observable acts. In this approach a teacher asked a question to groups of students, who answered, and received confirmation, redirection or another question. Teachers used questioning sequences often to check that students had learned or remembered key information.

– A final approach observed was discussion. These were exchanges that went beyond short answers, to extended turn taking, following the contextually and culturally rich process of *talanoa,* which is elaborated below.

5   Weaving a New Pedagogy

Classroom talk might be considered to be the site where culture gives meaning to school life. As a pedagogy, talk instantiates an epistemological stance, the relationships between speakers and a theory of learning. Here, we draw on 'talk' as a pedagogy familiar to the research-practitioner team from diverse perspectives. In this section we briefly describe a dialogic approach to teaching (Alexander, 2006) alongside the contextually familiar cultural practice, of talanoa (Violeti, 2006, 2013, 2016).

There are many definitions of dialogic pedagogy from various international authors in this field (e.g., Mercer & Dawes, 2010; Michaels, O'Connor, & Resnick, 2010; Reznitskaya & Wilkinson, 2015). Alexander's (2006) substantial contribution identified five principles of productive talk in classrooms. For him dialogic teaching is;

– *collective:* teachers and children address learning tasks together, whether as a group or as a class rather than in isolation;

– *reciprocal:* teachers and children listen to each other, share ideas and consider alternate viewpoints

– *supportive:* children articulate their ideas freely, without fear of embarrassment over 'wrong' answers; and they help each other to reach common understandings

– *cumulative:* teachers and children build their own and each other's ideas and chain them into coherent lines of thinking and enquiry;

– *purposeful:* teachers plan and facilitate dialogic teaching with particular educational goals in view (p. 38).

These principles of a dialogic approach resonate with the pan-Polynesian concept of *talanoa*. From a research perspective, '*talanoa*' is both method (technique or process) and methodology (philosophical guide) ('Otunuku, 2011; Johansson-Fua, 2014). In Tongan culture, according to Vaioleti (2016), "*Talanoa* is a process that is an important part of social identity and a Pacific way of viewing and negotiating the world" (p. 4). Moreover, it is values-based (Manu'atu, 2000; Fa'avae, Jones, & Manu'atu, 2016; Johansson-Fua, 2014) which encompasses Alexander's wider definition of what pedagogy entails. Like Alexander's notion of dialogic pedagogy, it is both "functional and relational; it is an instruction of what to do and how that is to be done" (Vaioleti, 2016, p. 2).

The dialogic principles: reciprocal, supportive and collective have a synergy with the values-based practices of *talanoa*. The values-base is elucidated by Johansson-Fua (2014) who promotes four key principles of *faka'apa'apa* (respect), *loto fakatōkilalo* (humility), *fe'ofa'aki*, (love, compassion) and *feve-itoka'i'aki* (caring and generosity). Also, for students to be skilled in the act of *talanoa*, they need to be skilled in *fanongo* (listening). As pointed out by Taufe'ulungaki et al. (2007), the process of learning begins with *fanongo* (listening) and *siofi* (observation) both of them practices underpinned by values such as humility and respect.

Alexander's (2006) final principle, 'cumulative' implies the need to build deliberately and explicitly on the contributions of others. This cumulative principle references collective meaning making, through conversations built on relationality. *Talanoa* operationalizes this due to the way in which it opens up culturally appropriate discourse opportunities in which "...Pacific peoples undertake to create meanings about themselves within the world in which they live and their relationships to that world and each other" (Vaioleti, 2016. p. 1).

The principles that make dialogic pedagogy effective for promoting cumulative and collective thinking are instantiated in the use of *talanoa*: within professional learning meetings and as an approach in classrooms, as talk becomes both *what to do* and *how it is done.*

Conversation beyond 'question and answer' to more in-depth exploring of ideas, opinions and perspectives is a powerful approach when thinking deeply is required. Such conversations require that students share their thinking, possibly justifying their response or considering alternative ideas. Internationally, classroom conversations of the sort that Alexander described, which might be considered a specialized form of *talanoa*, where students engage in turn taking and building on each other's ideas, are rare. However, when they were observed, they were powerfully supportive of critical thinking and depth of learning, signifying *talanoa malie,* dialogue that makes sense and is interesting (Taufe'ulungaki et al., 2007).

We used our observations of classrooms to understand the patterns of approaches that teachers chose in their lessons. In the early phases of the program, most common were teachers showing students how to perform tasks or using pedagogical approaches that entailed repetition. There were also question and answer sequences that sought information, for example the title and the author of the story. We asked whether a predominance of an approach might mean that teachers need support in knowing how to enact a more challenging approach. Such a situation provided the opportunity for offering a greater variety of threads for use in the mat: for widening the repertoire of approaches. In other situations, an approach chosen might not be the most appropriate way of teaching the target skill. In such a situation, weaving offered the opportunity to consider which thread might best be suited to the particular place in the mat. In this situation, teachers might be supported to match the choice of an approach to the focus of the teaching: choosing a suitable approach for their intended lesson or choosing multiple approaches within a lesson.

6 The Many Different Kinds of Decisions of Which Teaching Is Constituted

Consistent with our commitment to the notions of collaboration and partnership, our approach included the sharing of analyses and findings from the observations with all of our teachers and leaders. These *workshops* which were renamed '*sensemaking*' were a catalyst, we believed, for examining classroom focus and approaches, and sought to move towards patterns of *talanoa*, in content and form. Our ongoing process of collecting and then sharing back data about observable acts provoked the discussion based on what was observed, and therefore interpreted as occurring in context. Coupled with the collection of teacher and leader voice, the research-practice team was able to carefully categorize the strengths identified in these data before we began to weave together subsequent professional learning sessions, wherein teachers engaged in conversations, making decisions about focus and approaches for students with different literacy strengths and needs. This process supported our own stance of a formative approach, which modelled building from a position of strength, and made visible the processes required to use the strengths of the learners as resources for weaving new instructional designs.

Teachers engaged in discussions about the data showing the collective patterns of observable acts. We asked teachers and leaders, "what can we change to improve children's literacy?" Responses illustrated that there were already

solutions *within* that would support teachers to make decisions about their focus and approach to literacy. The task for the research-practice team was then to provide professional development content that would widen teachers' repertoire of approaches, and help them align those approaches most closely to their wider literacy focus.

7   Teachers Theories and Ideas as a Basis for Decisions

As discussed, pedagogy incorporates theories and beliefs about teaching and learning. Teachers and leaders reported that they valued thinking as important for students. Enacted, a shift towards approaches that valued thinking would also increase opportunities for students to engage in the literacy learning desired for them. One teacher explained her beliefs, "Teacher must try to ask questions at a higher level to encourage children to a higher level of thinking". Another simply stated that it was time to, "Do something about copying!" Many more suggested the need for a reduction of low level, constrained skills, "Less copying, more writing activities for them to *think*." Teachers suggested the need to increase discussion-based pedagogy, the need for teachers to be active in developing their own questioning strategies and proposed a focus on becoming better prepared in the planning stages' "I need to be prepared, to plan activities before the children come (the day before). Lessen copying time. Encourage student composition, with support from the teacher". The talk among teachers focused on the ways that they might enact those theories. The focus on composition, for example, also required teachers to think about innovative ways in which in-class support would benefit the achievement of these valued goals.

The observable form of the pedagogic *talanoa* was a cycle of data collection, feedback, sense making, planning and idea sharing. Over time the research-practice team observed increasing changes in the approaches and focus observed. Observable acts changed in focus, from reading single letter/words, towards reading texts, and then talking and thinking together about the text messages. Matching the shift in focus was a change in the approaches used by these teachers. Notable was an increase in discussion-based pedagogy and a marked decrease in showing and repetition. These changes signaled that students would be more likely to engage in higher order thinking and learning opportunities as a result.

Increasingly, teachers became critical of approaches that did not serve their theories. Teachers shared illustrations of change, reflecting on how they might increase student engagement beyond rote and recitation. Teachers' responses

showed openness to self-evaluation; for example, one teacher recorded, "My main weaknesses in teaching reading is in the asking of questions. I ask the same questions all the time. I mostly just use the stories on the charts so might have encouraged less thinking". Some teachers' reflections were modest about what they felt was making the difference, but explored the breadth of approaches and tasks required to improved outcomes, "Some students have improved and have moved from one group to another. All I did was involve children more in class activities, take more time to lead the slow groups and deal with kids that have problems individually and do more spelling and vocabulary works. Making varieties of activities helped too!" A further comment supported teachers' decision making and planning, "To further develop reading and making meaning, teacher first has to know what he/she will do".

Observations at the conclusion of the intervention programs revealed that teachers provided a greater range of opportunities to read text and engaged students in activities that required comprehension of texts. Furthermore, students were actively engaged for a higher proportion of time in class and students participated in much more *talanoa* during reading, in collaboration with each other. Students' assessments suggested that students were increasing proficient at being able to read and retell texts that they had read.

In the case study interventions, the power of sharing in *talanoa* with other like-minded teachers seemed catalytic for changes in teachers' practice, based on collaboration and sharing, problem solving and creating innovative ways to address the needs of learners. The formative approach to practice sought to promote opportunities for student learning that would engage them beyond the literal and into the critical elements that underpin skilled literacy. Importantly, our approach to pedagogy was not to ascribe binaries or focus on implementing known routines. Instead, teachers' beliefs and theories arose from decisions about observable acts in classrooms. But, as teachers expressed, the results of their influence extend beyond the classroom into life itself, leading to a different definition of what 'student centered' might mean in terms of a contextually defined pedagogy; a definition which privileges the purposes, before the forms of the pedagogy, "to be student-centered by helping them survive anywhere, reduce copying, stop spoon-feeding them all the time".

8   Concluding Comments

We have described here an approach to an 'education for development' intervention that seeks to abandon universalist assumptions of knowledge, teaching and learning. We have used the metaphor of weaving and the processes of

talanoa to considering a pedagogical model that moves beyond imposing the teaching practices upheld in countries from the North. Instead we consider how the dual processes of weaving and *talanoa* makes visible teachers' beliefs, values and practices which are shaped and informed by the cultural contexts in which schools exist. To this end, we argue that effective pedagogy in literacy can be considered an act of weaving a strong mat from existing contextualized resources.

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The Tail Wagging the Dog or Assessment for Learning?

Rebecca Spratt and Ritesh Shah

Abstract

The first part of this chapter asserts the need for increased attention to the shortcomings implicit in the globalization of assessment regimes developed as the means of measuring learning across a diverse range of contexts, and to address what has become framed as a 'crisis' of learning. Discussed are regional assessment programs in literacy for Pacific Islands countries within Oceania, which encourage the use of tools aimed at framing and classifying teacher practice in ways that have the potential to narrow the curriculum and pedagogical foci and approaches within Pacific Islands classrooms. Cautions are raised about such assessments of literacy, given that they often approach literacy from a reductionist and limited perspective.

Juxtaposed against this is the 'assessment for learning' approach which informed recent research-practice interventions in Solomon Islands and Tonga. Because initial research revealed that teachers had little evidence upon which to make informed judgements about their teaching and their students' learning, easy to use formative assessment tools were co-constructed for each country context. The principles underpinning these included the need for: tools based on knowledge of teachers' capability and curriculum context; diagnostic information about what the child can do, and needs to learn; a learning continuum, so next learning steps are clear for the teacher; balance between reliability and the need for validity and usability. The development and use of these formative assessment tools were identified as a powerful and positive influence for building pedagogical knowledge and improving teacher practice and student learning.

1 Introduction

The imperative of yesterday's development discourse—getting children into school and promoting access to primary education—has been replaced with the new global agenda of ensuring those who are in school are actually learning. In the years that followed the ratification of the Millennium Development Goals (MDGs), it soon became apparent that the push for access promoted by the international community had compromised educational quality (see for example, Lewin, 2009; Sifuna, 2007). Successive reports and publications by the United Nations Educational, Scientific and Cultural Organization (UNESCO), tasked with tracking global progress against the MDGs for education produced an emerging picture of successes in terms of access, but poor outcomes in terms of learning (see for example UNESCO, 2006, 2009). But it was the release of the World Bank's (2011) new Education Strategy—*Learning for All*—which focused global attention on what became framed as a 'crisis' of learning. Citing research from a range of contexts, the strategy suggests that, "schooling has not resulted in more knowledge and skills", and that despite, "… substantial resources spent on education, [results] have thus far been disappointing in terms of learning outcomes" (p. 17). Data from international and regional large-scale assessment studies reinforced the notion of a learning crisis and led to a growth of new standardized assessment schemes at regional and national level for 'developing' countries. These assessment schemes have gained a life of their own and have acted to frame and shape the problem of and solution to the so-called learning crisis in particular ways. Yet, as several scholars have noted recently, important questions need to be asked about: (a) the desirability and feasibility of using these large-scale international assessments to measure learning across a diverse range of contexts; and (b) what messages this sends or reinforces about colonial divisions of the world (where learning happens and where it doesn't) (Fischman, Silova, & Topper, 2017; Ravitch, 2017; Silova, 2018).

In this chapter, we explore the implications of more recent regional literacy assessment initiatives and measures that have been introduced into the education systems of countries across the Pacific Islands region, including one of the countries of focus in this book, Tonga. We see some of the same problems highlighted above manifested in the Pacific Islands region, and suggest that these assessment regimes have potential to reshape literacy learning practices in ways that are devoid of context, and ignore the richness of literacy practices which exist within and outside school settings across the Pacific Islands region. Some of these top-down assessment practices, we argue, are structuring of teachers' work in ways that may ultimately not serve the interests of Pacific

Islands learners. Instead, we highlight a different approach to understanding both the problems and solutions to literacy learning in Pacific Islands classrooms, one that focuses on assessment for learning rather than merely assessment of learning. This, we argue, offers an alternative 'bottom-up' focus which gives focus to classroom practices and pedagogy, alongside student learning outcomes, to drive discussions and action on what teachers, schools and communities see as needing attention, thus ensuring that quality education maintains a focus on learning, relevance and equity.

2   Assessment: Reframing the Locus of Control for the Problem and Solutions to the Literacy Crisis in the Region?

Over past decades, there has been recognition by Pacific Islands nations, of the need to address issues of learning and quality in their systems. Historically, national education strategies of countries in the region and regional educational collaborations and initiatives such as the Rethinking Education in the Pacific Initiative, maintained and reinforced a commitment to improving learning outcomes for Pacific Islands students (see for example Coxon & Munce, 2008; Nabobo-Baba, 2012; Sanga, 2016). As part of this, educational quality and relevance were seen as equally important, with strong emphasis on coming up with approaches that were contextually and culturally grounded.

Although the World Bank had initiated earlier attempts to develop regional literacy and numeracy assessments (e.g., Pacific Island Literacy Levels [PILL] in the 1990s), in the first decade of the new millennium, the World Bank and the governments of New Zealand and Australia, renewed their support towards firstly measuring literacy learning across the region, and then identifying trajectories by which systems across the region could improve quality. For example, the World Bank supported the adaptation and utilisation of the Early Grades Reading Assessment (EGRA) in Tonga in 2009 and Vanuatu in 2011. It was found that reading levels in the early grades were low and progression towards fluency for comprehension were very slow, identifying that only 3 in 10 students in Tonga and 2 in 10 students in Vanuatu were able to read with enough fluency to understand most of the text they read after three years of schooling (World Bank, 2013). On a wider scale, in 2012 the Pacific Island Literacy and Numeracy Assessment (PILNA) was instigated by UNESCO working with the regional agency South Pacific Board of Educational Assessment (SPBEA, later renamed Educational Quality Assessment Program [EQAP]) as a regional benchmark initially across 14 Pacific Islands countries. The 2012 assessment found literacy learning in the Pacific Islands region in a "dire situation" with

only three in every 10 students performing at expected levels in years 4 and 6 of primary school (SPBEA, 2012, p. 2). The results garnered attention at a political level, and EQAP was given the mandate by a regional meeting of the Ministers of Education to repeat and expand the PILNA, and secured funding from New Zealand and Australian aid agencies for this work (Belisle, Cassity, Kacilala, Seniloli, & Taoi, 2016). Administration of the PILNA in 2015 reaffirmed the 2012 findings. The reports analyzing these results concluded students' poor performance reflected a lack of systematic, consistent, and comparative evidence from standardized assessments across the region. Also concluded was that these assessment data have failed to drive reforms and improvements in teaching and learning (EQAP, 2015; Levine, 2013; UNESCO, 2015). In the 2015 PILNA, conditions were placed on country participation that included:

> that each country is committed to using the findings to carry out policy interventions as well as technical interventions (for example, classroom instructional intervention to improve learning outcomes) aimed at improving the situation in each country. (Belisle, 2016, p. 6)

While there is no doubt a greater need for assessment to shape and inform educational practices, there are also risks, we maintain, when assessment becomes the 'tail that wags the dog'.

Specifically, and drawing on Basil Bernstein's (1990) ideas around pedagogic discourse, it could be argued that these regional assessments are acting to reframe curriculum, by changing the dynamics of who has power over the selection, sequencing, and pacing of the material that is taught. Also problematic is their potential in reclassifying teaching and learning by shifting demarcations of valid knowledge within the realm of literacy instruction. There are several concerns specific to the use of EGRA for example, and the ways it both measures, and then makes policy recommendations for change. Firstly, EGRA's design is based on particular understandings of how children learn to read and become literate. Yet, it is acknowledged by the designers of the EGRA that "these phases vary by country and by language," and that the literacy stages proposed in EGRA may not suit all contexts (Gove & Cvelich, 2011, p. 20). Secondly, EGRA also isolates aspects of literacy learning rather than emphasizing how they develop together. This is represented, for example, in the controversial task where children read 'nonsense words', which pits phonics against comprehension. Thirdly, EGRA ignores the important and developmentally essential interactions between print exposure, reading, and oral language development, as well as the links between reading and writing. This is despite the fact that oral language development cultivated at home and in the community, often

helps children to expand their vocabulary (Sørensen, 2015). As Bartlett, Dowd, and Jonason (2015) identify, caution needs to be taken in embracing findings from such international assessments, given the fact that often they approach measuring literacy from a reductionist and limited perspective of the subject.

This hasn't stopped agencies like the World Bank from making specific policy recommendations to governments across the Pacific Islands region on ways to reform literacy instruction. For example, following the piloting of EGRA in Tonga, the World Bank (2012) recommended to "improve instruction in Tongan phonics and increase phonemic awareness levels among students" (p. 12). This recommendation was made despite the fact that when the study explored the links between teacher's pedagogical practices and student literacy, the only definitive conclusion from the analysis is that students who retell stories have higher rates of oral language fluency—suggesting the importance of language rather than phonics. It goes on to specify that "many…factors traditionally associated to better reading outcomes showed contradictory or counterintuitive results" (ibid., p. 13), including explicit phonics instruction.

Following TEGRA, a program was developed for selected schools that saw explicit refocusing of literacy efforts towards phonics and phonemic instruction. The Pacific Early Age Readiness and Learning (PEARL) initiative funded through the Global Partnership for Education (GPE) and Australia's Department of Foreign Affairs and Trade (DFAT) implemented with World Bank support, has aimed to "implement a specific pedagogic approach for reading instruction," based on teaching phonics and phonemic awareness, by providing, "…[a] sequencing of skills and competencies, including understanding the relationship between printed letters and sounds and their reading fluency" (World Bank, 2019, p. 7). The relationship between the assessment—in this case TEGRA—and pedagogical reform is quite clear (towards phonics instruction). It presents a clear case of the tail wagging the dog. The consequences are potentially quite alarming in terms of firstly, a reframing of literacy instruction out of the hands of educators and into the hands of "international best practice" as the World Bank (2019, p. 7) claims; and secondly, reclassifying literacy instruction away from a diverse repertoire of language experiences towards explicit phonics teaching. As one Tongan teacher specified, "PEARL have their material in planning and teaching and they say we have to focus on using that planner to teach…they give us material *to force us to focus on*" (emphasis added). Rather than assessment empowering teachers to reflect on their own pedagogical practice, EGRA, and the PEARL initiative which followed, appear to have attempted to disempower any sense of professional agency for this teacher.[1]

The World Bank itself recognises the risks in promoting a greater focus on measurement—acknowledging there is truth to the sayings 'what gets measured gets managed', and 'just weighing the pig doesn't make it fatter'. But it goes on to argue that: (1) a lack of measurement makes it hard to know where things are, where they are going, and what actions are making any difference; (2) knowing these things can provide focus and stimulate action; and (3) there is a need for measurement tied to action. While these points are not problematic in themselves, what the World Bank fails to acknowledge is the importance of assessment being embedded within the learning context of the classroom and supporting learning in a formative way. Whether intentional or not, its promotion of EGRA in the region risks shifting interest in the literacy crisis, the coordination of solutions to the crisis, and ultimately the instructional and regulative discourse further away from the lived realities of learners and teachers in Pacific Islands classrooms. As Wetzel (2018) astutely notes,

> Organizations that are focused on literacy often rely on discourse from the literacy crisis to make claims about literacy rates and why they are a problem. This discourse appeals to those who want to help...The danger, however, is that each time a literacy crisis discourse is evoked, dominant and narrow views about what counts are reproduced. That means we may move further and further away from understanding diverse literacies, what and how students know, and what literacies will support them most for participation in a changing world.

Against the situation we've outlined, we now shift our discussion to an alternative way forward; one which we believe allows for and affords space for identifying diverse understandings and contextualized solutions to literacy challenges in Pacific Islands classrooms.

3   Assessment for Learning and Design-Based Research

In contrast to large-scale international or regional assessments of learning, the notion of assessment for learning (AfL) and practices of formative assessment have been an integral part of teaching in many classrooms around the world for some time. However, the current discourse on formative assessment as critical to effective teaching and learning only really began with Black's publication in 1998 of a synthesis of results from numerous studies which showed the powerful, positive influence that formative assessment can have on student

learning (Birenbaum et al., 2015). The term assessment for learning (AfL) was coined soon after by the Assessment Reform Group (2002) and defined as:

> [The] process of seeking and interpreting evidence for use by learners and their teachers to decide where the learners are in their learning, where they need to go and how best to get there. (p. 2)

The philosophy of AfL is integral to the design-based research (DBR) approach that underpins the two case study interventions discussed in this book. As elaborated in Chapters 4 and 5, the interventions were premised on several key assumptions about teaching and learning in school settings: that students need opportunities to learn which are responsive to what they already know and can do; that teachers' beliefs about children's learning heavily influence their teaching; and, that teaching and learning are contextually contingent. The corollary of these assumptions is that an effective approach to teaching is that which uses knowledge of what a child knows to design learning opportunities. This, in turn, relies on teachers having accurate understandings of what their children know, and how to move them to something unknown, and that this is an ongoing process within the day to day work of the classroom; in other words, a practice of formative assessment.

The focus on AfL within the interventions also cohered with other key principles of DBR as discussed throughout this volume, specifically: student learning as the key indicator of effective teaching and an effective intervention; a focus on the real-world practices of teaching and learning within the classroom; and the value of teachers engaging in professional conversations about student learning with each other. The purposeful focus on teachers' use of formative assessment practices (as will be discussed below) also cohered with DBR's focus on sustainability. Teachers and school leaders who have an integrated understanding of formative assessment practices and the use of information about students' learning as an ongoing, day-to-day tool for informing teaching and leadership decisions, are well placed to sustain these practices, which is in turn likely to sustain improved student learning. Similarly, teachers and leaders who demonstrate a frankness about looking at and questioning their own practice in light of data on their students' learning, and a willingness to try out different ways of doing things, are also more likely to sustain improvements (Lai, McNaughton, & Hsiao, 2011). Importantly, the focus on formative assessment practice within the interventions was designed not just to advance student learning, but also to foster collaborative learning by teachers, school leaders, and the intervention teams. This aligned with the concepts of relationality and research-practice partnership that underpinned the interventions.

Having provided this overview of AfL and its relationship to the DBR approach as adopted in the case study interventions, we will now describe how the focus on formative assessment practice was operationalised within the Temotu Literacy Support (TLS) and Literacy and Leadership Initiative (LALI). Before doing so, we need to address an important issue of terminology and definition. We have been using AfL and formative assessment interchangeably so far. However, some would argue that formative assessment is a narrow practice of undertaking regular 'testing' to provide teachers with evidence to revise and plan their teaching (Stiggins, 2002). AfL, on the other hand, involves the continuous use of information about students' learning, gathered through multiple means including informal observation and conversation, and importantly involves students actively in the self-assessment of their own learning (Assessment Reform Group, 1999). Therefore, for the purposes of clarity in the following discussion, we will use the term AfL to refer to the broader concept, and use formative assessment to refer to the more practical application of tools by teachers for advancing student learning.

4 Development and Formative Use of Teacher Administered Student Learning Assessment Tools

Through the profiling phase in each country (see Chapter 4 for elaboration), it was found that teachers demonstrated intuitive knowledge of, and concern for, what their students knew, could do, and were struggling to do. However, typically teachers in the case study schools had little systematic evidence upon which to make informed judgements about what to focus on in their teaching to best meet their students' needs. The assessments collected were mainly summative and were not used to inform lesson planning. There was a need in both countries for an easy to use, teacher administered assessment, through which teachers could identify students' learning needs. Further, while teachers valued the guidance offered by curriculum documents as to what children should know and should learn next, and had well established beliefs about this, there was an opportunity to strengthen the pedagogical content knowledge (PCK) that underpinned these beliefs, and to advance teachers' knowledge and skills for working out the appropriate next step for their students.

Therefore, both the LALI and TLS interventions were designed around repeated cycles of structured, teacher-administered formative assessment of students' learning, moderated, and analyzed collaboratively by teachers working with the intervention teams, for the explicit purpose of enabling teachers to determine students' needs and how best to respond to those needs. Given

the limited formative assessment tools in use in the case study countries, the co-design of new tools became a first key activity of the interventions.

The development of tools for each country was underpinned by several key principles including:

– The co-design of the tool to be informed by knowledge of teachers' capability and curriculum context
– The need for diagnostic information about what the child can do, and needs to learn
– A learning continuum, so next learning steps are clear for the teacher
– A balance between reliability of the assessment tool (so that it could be applied consistently) and the need for validity (so that it gave useful information about the focus) and usability (so that teachers can use it easily).

The tools were designed in line with the priority learning foci in each country; reading comprehension, reading-writing links and grammar in Tonga, and the use of letters, sounds, words and grammar to make meaning orally and in writing in Solomon Islands. The intervention teams and teachers had jointly identified these priorities through collaborative analysis of classroom observation and student achievement data specific to the case study schools, and thus the learning foci also responded to teachers' priority concerns. In both countries simple letter/sound assessments were developed for years 1–3 (in Solomon Islands these were based on existing materials developed by the local Ministry but not yet available in the TLS classrooms). In Tonga, a read and retell assessment was developed to create extended opportunities for reading comprehension beyond the literal. For TLS, a rubric for assessing written compositions was developed. Both the read and retell and writing rubrics were developed to deliberately address the agreed priority learning need, and to provide guidance for teachers in terms of next steps. The tools allowed teachers to privilege opportunities for students to generate their own ideas, and provided platforms for generating talk in the classroom, thus facilitating more holistic literacy development rather than just mechanistic reading and writing skills. In both cases, the tools were also carefully aligned with the existing curriculum. Therefore, while the assessment tools themselves were new, their connection to the many subsets of skills in literacy identified in current curriculum documents, provided familiarity for teachers.

When the draft tools were trialed, their initial use revealed the need for teachers, leaders, and the researcher-practitioner teams to share clear understandings about formative purposes, and therefore the 'low risk' nature of formative assessment. In addition, there was need for clarity around languages and parallel resources to reflect different language contexts between and within countries. Finally, there was a need to be cognizant of teachers' time, and to minimize the compliance costs of over testing in terms of

student learning. Thus, additional principles for the design of the formative assessments included that they be low risk, quick to administer, and language specific.

Starting from the end of 2015, these assessments were administered, marked and moderated by teachers in the case study schools, with support from the researcher-practitioner teams. Assessments were carried out at the beginning and end of each school year until 2017, a total of five times over the life of the interventions. The moderation and subsequent planning processes under-taken collaboratively by teachers and the intervention teams, and with school leaders, were particularly powerful. To support these processes, tools such as an Ask Build Check (ABC) framework (as used in LALI) and other key planning tools were also introduced. These tools supported collaborative examination of learner needs, by providing key focus questions that teacher and leaders engaged in as they interrogated their initial data set and planned their learning tasks. Importantly, it was through these discussions that teachers' beliefs about children's learning and 'good' teaching were unearthed, discussed, debated, and reviewed in light of the patterns shown in the data.

As expected, it took some time for the teachers and school leaders partic-ipating in the interventions to adapt to this way of working. However, quite quickly they started to see the value as indicated in the following quotations from teachers involved in LALI and TLS:

> I have to plan according to my analysis and whatever. LALI has taught us how to do that, how to analyze that and then plan, re-evaluate, then plan again, especially to carry the students from where they are to what we really want them to be.

> Before we didn't talk...about the achievement of the children. We just talk[ed] about the techniques. We focus more on how the children are achieving learning now.

Teachers stated that they particularly valued the opportunities to talk together and learn from each other in moderation and collaborative planning based on the data from the formative assessments. In both countries, continuing forma-tive assessment practices, using strategies and resources developed through LALI/TLS, and maintaining collaboration between teachers within the school were identified as activities schools wanted to sustain, and believed they could do so without further external support.

A final important note about the use of formative assessment within the interventions is that the teacher-administered assessment data also served a summative purpose of assessing the number of students who are meeting

relevant curriculum expectations and to track the shifts over time. This was in line with the DBR approach, which relies on repeated measures over time to ascertain, in a reliable and valid manner, whether the interventions are contributing positively to improved student learning outcomes, as a fundamental ethical accountability. Thus, the data collated at end of year 2015 served as the baseline for the interventions and allowed for comparison across three school years. The comparison enabled us to identify whether patterns of growth in 2016 and 2017 were different or similar to those expected in the absence of the interventions, which was shown using longitudinal growth curves. Furthermore, formative assessment data collected at the beginning and end of 2016 and 2017 provided a record of growth and change of students over two years. Such modelling also allowed us to estimate the effects of particular teachers, schools, and clusters on student performance. Thus, while the focus of work with teachers was assessment for learning, the same data was used as assessment of learning. At times this created tensions, particularly in terms of balancing the importance of usability and low risk for teachers, with the need for reliability and consistency for the assessment of learning. These tensions are further explored in Chapter 9.

5   Formative Assessment as a Relational Process of Learning, for Learning

As noted above, the approach to formative assessment practices, as used in these interventions, advanced several key objectives. First, it established children's existing knowledge as the starting point for planning instruction and redefined 'good' teaching as that which advances student learning within context, thus affirming the children and their teachers within their context. It fostered explicit attention to how teachers' actions create opportunities for students to learn, and offered teachers meaningful evidence to make decisions on how best to do that, thus positioning teachers as agentic. This contrasts with the dominant narrative (globally, regionally, and nationally) on teachers as the problem, adherence to externally developed guidance (often prescriptive) as the solution, and summative assessment of students as the only recognized opportunity for assessing teachers' effectiveness.

Second, it both affirmed local curricula and enabled more practical application of curriculum expectations by teachers in the classroom. This was of particular importance in the TLS context where teachers often were unfamiliar with concepts used in curriculum documents.

Third, it allowed for the unearthing of teachers' beliefs about 'good' teaching and learning in a respectful manner. This was simultaneous with providing

teachers an opportunity to reflect on that knowledge, and through dialogue with peers and researcher-practitioners and interrogation of the data, to review and/or extend that knowledge. Thus, the processes of formative assessment provided a powerful, relational means for building pedagogical knowledge, adaptive expertise, and collective efficacy.

Fourth, it built collaboration between teachers and encouraged learning from each other in a manner that was also important for sustainability.

Finally, the focus on enhancing teachers' capability in the regular use of structured formative assessment tools enacted the important learning principle of moving from the known to the unknown, and provided a contextually appropriate entry point for promoting a broader assessment for learning perspective. The relatively structured approach of the formative assessment tools shared similarities in format with the dominant practice of summative assessment, and therefore held some familiarity for teachers. At the same time, the emphasis on the formative use of these assessments, and the collaborative moderation and planning processes undertaken, allowed for explicit articulation of the principles underpinning formative assessment and assessment for learning. And as teachers became more comfortable with these AfL principles, some were able to begin to integrate them into their day to day teaching practice. Thus, while the interventions' focus on structured formative assessments twice a year could be critiqued as not far enough along the continuum of 'assessment for learning', we considered that, at that point in time, it was contextually appropriate and responsive. It affirmed and responded to where teachers were at, shifted them to an appropriate next step, with the view of this then being extended further over time (albeit inevitably outside the 4-year intervention timespan afforded by the funding agency).

Furthermore, the approach taken to formative assessment was a relational approach, which cohered with Tongan concepts of *mafana* and *malie* as described by Johansson-Fua (2014). When applied to an intervention these concepts focus our attention on the extent to which the intervention has engendered shared understandings and built a shared sense of empowerment among those involved to be able to solve their challenges together. These concepts direct us to ask whether the intervention was meaningful, honest and worthwhile; who benefited from the activity and in what way, and has it served the needs of the communities that we serve and belong to. When such questions are applied to the assessment of learning approach outlined in the first half of this chapter, the responses point much more to a managerial and performative agenda that serves and benefits bureaucratic powers of control, and in which the benefits for student learning within culturally diverse classrooms are unclear.

Mafana and *malie* also direct us to privilege the voices, experiences, and values of those involved in the intervention, and provide opportunities for them

to make sense of things themselves. And importantly, these concepts recognize the mutual learning and transformation processes that occur within interventions; while intervention teams are often positioned as 'experts', interventions that effectively achieve *mafana* and *malie* engender learning and transformation amongst all those involved. The formative assessment processes within the intervention advanced these values, in engendering shared understandings, building efficacy, and privileging teachers' beliefs, while also providing safe space for contestation through maintaining the focus on how teaching practice benefits students' learning in a meaningful way.

6   Concluding Comments

This chapter has explored two different perspectives on the relationship between assessment and learning that are active within Oceania at this time, one which emphasizes assessment *of* learning, and the other assessment *for* learning. Both are positioned in the discourse as powerful forces for advancing student learning, but rarely as complementary and quite often in tension. In concluding the chapter, we draw on Birenbaum et al. (2015), who contend that the tension between AfL and assessment of learning,

> will never be resolved until both modes of assessment complement one another in a meaningful way. In essence, AfL research should inform both the design and administration of accountability measures and more importantly promote national/state policies that underpin the prominence of AfL as the key driver of student learning. (p. 135)

We hope that this Chapter demonstrates the value of dialogue towards a constructive relationship between those working at the level of regional and national assessments of learning in Oceania and those engaged at school and classroom level, in support of advancing meaningful assessment for and of student learning within context.

Note

1   PEARL was initiated as a pilot program utilizing a randomized control trial research design, and implemented in a selected number of schools over the same time frame as the LALI intervention described in this volume. Following the results of the pilot, World Bank actively lobbied the Tonga Ministry of Education and Training (MET)

to extend the program to all primary schools. However, to date MET has chosen not to do so, whereas, as noted in Chapter 9 the approaches developed through LALI, in particular the formative assessment practices, are now being mainstreamed across all Tongan primary schools under the leadership of MET.

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PART 3

Learning for International Development

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When Evaluation and Learning Are the Intervention

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Abstract

Results-based management and the desire to ascertain 'evidence-based best practices' that can be applied internationally are dominant global agendas, which impact heavily on aid funded education interventions. Concurrently however, there is a growing recognition of the complex nature of generating locally valued, and therefore sustainable, improvement in schools in diverse contexts. Further, that many of the 'problems' that we are seeking to 'solve' within education and aid are not bounded, are contextually-contingent, and solutions cannot be pre-determined. As a result, there is growing acceptance of the need for adaptive approaches to interventions that allow for solutions to emerge from the context and to adapt to on-going learning.

The intersection between, and implications of, these competing perspectives for the evaluation of education interventions are explored in this chapter. The blurring of lines between intervention and evaluation, brought about through a design-based research approach, is explored. Particular attention is paid to the role of learning and context as relational processes central to both intervention and evaluation. The importance of valuing indigenous epistemologies and the potential role of indigenous research methodologies for both intervention and evaluation functions are addressed. The chapter highlights the tensions that arise from embedding monitoring and evaluation within the intervention design, where adaptation, process and relationships are both means and ends. Balancing context-driven values of what counts as evidence and as success, and the implications of working through a relational lens, are discussed with reference to education interventions within Oceania.

Keywords

results-based management – evaluation – international aid – indigenous epistemology – indigenous research methods – tok stori – design-based research – complexity

1   Introduction

Program design and delivery approaches that are iterative and contextually responsive and involve ongoing learning and adaptation, are becoming more common in international aid and in education interventions. Such approaches, described here as 'adaptive approaches', demand new ways of thinking about both 'intervention' and 'evaluation' that challenge dominant assumptions of how accountability and learning are enacted. This chapter explores the implications for evaluation of one such approach, design-based research (DBR), to aid-funded interventions.

The chapter begins by briefly exploring the evolution of evaluation within international aid, the rise of the Results Based Management (RBM) approach, and the intimate relationship between conceptualizations of intervention programs and their evaluation. The emergence of adaptive approaches and associated developments in approaches to evaluation are discussed with reference to both the international aid and 'education for development' sectors. Using the experience of the case study interventions discussed in this book, the practical implications for monitoring and evaluation (M&E) of using a DBR approach for an aid intervention are explored with particular attention to the tensions that arise through attempts to marry DBR and RBM. The positioning of indigenous epistemology and methodologies as central to both intervention and evaluation strategies, and as necessitated by DBR's commitment to context and to learning, are also investigated.

2   The Evolution of Evaluation in Aid

The new public management (NPM) agenda which has dominated public management since the late 1970s, has driven a particular set of assumptions about programs, about the problems they are addressing, about what counts as success and, therefore, about how to evaluate success (Eyben, 2013). This discourse asserts that the efficiency and effectiveness of a program can be predicted through cause-effect logic, and managed through a focus on accountability for

pre-determined results. This assertion is in turn based on two key assumptions. First, that social problems are bounded and can be solved through equally bounded and pre-designed interventions implemented exactly as planned. Secondly, it is based on particular ways of thinking about human behavior and assumptions of how the public sector (including aid agencies) can best influence and change behavior. As Eyben (2013) explains,

> Accountability for results or performance against pre-established objectives is a response to the 'principal-agent problem', a theory positing that because individuals are assumed to be always in pursuit of their own selfish interests, policy intentions are likely to be subverted by those designated to implement them. (p. 13)

Out of such thinking has emerged the now dominant discourse and practices of results-based management (RBM) and performance culture, within the fields of both international aid and education. RBM has been widely critiqued as promoting an 'audit culture' that distorts practice towards what is measured rather than what might work best, distorts priorities to performance measurement, reporting and compliance, and distorts reality by oversimplifying complex processes of social change (Barder & Ramalingam, 2012; Eyben, 2013). In this context, evaluation is essentially about testing the validity of a pre-designed model and achievement of pre-determined results; as Donaldson, Patton, Fetterman, and Scriven (2010) have argued, "evaluation has been hijacked by a 'model mentality', where we're either improving the model or overall judging the model" (p. 25).

In contrast, there is an increasing recognition that due to the complex nature of the problems that we are seeking to solve within education and aid, much more adaptive and contextually-responsive approaches to intervention design and evaluation are required (Ramalingam, Wild, & Buffardi, 2019; Snyder, 2013). As McNaughton (2007) has argued, adaptation is an "inherent property" of schools, of communities, and of all social groups (p. 3). Therefore, the historic focus on implementing pre-designed programs with fidelity is misplaced. Instead, "implementations need to be constructed on the ground as contextually appropriate" (ibid., p. 3) with the expectation of adaptation throughout implementation.

Design-based research exemplifies this trend, as do other adaptive approaches currently popular in international aid such as Problem Driven Iterative Adaptation (PDIA) (Andrews, Pritchett, & Woolcock, 2012; Jesson & Spratt, 2017; Ramalingam et al., 2019). In eschewing notions of bounded problems, reductionist linearity and pre-designed solutions, these approaches

promote instead co-design and iterative problem solving, involving partnerships between researchers, implementers and program participants, and designing for and within the context. As such, these approaches not only reconceptualize what 'intervention' looks like and the traditionally rigid boundaries between research, design, and implementation, but also necessitate a different way of thinking about evaluation from that promoted by RBM and mainstream program evaluation (Patton, 2010). In adaptive approaches, accountability becomes not just about quantifiable results (although results are still critical) but about demonstrating responsiveness, adaptation, and learning, recognizing these as at the heart of sustainable development (Eyben, 2013; Patton, 2010; Wagner, 2017). According to Patton (2017), "All evaluation teaches something. What is taught and how it is taught varies, but evaluation is inherently and predominantly a pedagogical interaction" (p. 74). This shifts the focus of evaluation from a concern about performance against pre-determined results, to a concern for integrity of implementation, as Paul LeMahieu (2011) of the Carnegie Foundation maintains:

> What we need is less fidelity of implementation (do exactly what they say to do) and more integrity of implementation (do what matters most and works best while accommodating local needs and circumstances).

A focus on integrity of implementation requires evaluative processes to be integral to, and interspersed throughout, implementation. It places an emphasis on engaging all stakeholders in learning processes and fostering deliberate, evidence-informed adaptation. Thus, in adopting a DBR approach to program intervention, the lines between intervention and evaluation are both blurred and unified by an understanding that in social interventions, 'development results' and accountability emerge from, and are enacted through, collective learning.

The blurring of the lines between intervention and evaluation, and reframing of accountability in relational terms, offer both opportunities and challenges when adopted within the bounds of an aid-funded project. The case study interventions of this volume provide valuable insights into these opportunities and challenges. Specifically, this chapter will focus on several tensions that emerged between:

– how an intervention is experienced in practice and the way in which it is 'seen' through reporting,
– relational and principal-agent notions of accountability,
– the resourcing of learning and the resourcing of results, and
– indigenous epistemology and research methodologies and the positivist paradigm of results-based management.

As will be discussed, the importance of indigenous epistemology relates to far more than just the evaluation of aid-funded interventions and would easily justify a chapter on its own. However, exploring indigenous epistemology through the lens of evaluation brings to the fore the fundamental issue of whose knowledge and ways of knowing are valued. First, a brief description of the nature of the evaluation approaches designed for the case study interventions is provided.

3   Case Study Monitoring, Evaluation and Learning Approaches

As outlined in Chapter 4, the case study interventions drawn on for this book adopted a DBR methodology. DBR provided the framework for both intervention and evaluation, and M&E was integrated within the intervention rather than operating as a separate set of data collection and analysis processes. The corollary of this is that DBR, as contextualised within the interventions discussed here, is a form of, and requires, a developmental evaluation approach. Developmental evaluation facilitates evidence-based adaptation of the intervention design throughout implementation, and focuses not on proving the effectiveness of a pre-designed model, but on supporting ongoing development of intervention design within complex and uncertain circumstances (Patton, 2010).

This developmental evaluation approach, and the processes of co-design that underpinned the case study interventions, placed the emphasis on ongoing learning for all those involved. Thus Monitoring, Evaluation *and Learning* (MEL) frameworks were co-designed for the interventions, with an explicit and deliberate emphasis on learning. MEL was 'interwoven' with the DBR approach. This meant that the data collection, analysis (sense-making) and decision-making processes, and the learning that emerged through these processes, were both key strategies for generating change in teachers' practice and the means for ongoing evaluation and iteration of the intervention design. Further, these processes were undertaken in partnership with schools and Ministries to foster shared learning and collective accountability for improvements, rather than an appraisal of performance of individual stakeholders. Importantly, the intervention team were also learners in these processes; continually evaluating and learning from not just the effects of their own actions, but the multiple interactions taking place within the context that may be influencing change.

A final important feature of the case study MEL frameworks, was the valuing of indigenous epistemologies and use of indigenous methodologies as

strategies for both intervention and evaluation. Engaging with indigenous epistemology and methodologies contributes to greater validity, legitimacy and authenticity of intervention processes, data collection, and subsequent co-construction of knowledge and evaluation of 'success'. As will be described more below, the use of indigenous methodologies such as *tok stori* also reflected the intertwining of intervention and evaluation, in its relational focus on the lived experience of the school communities (Sanga, 2015, 2017).

However, the case study interventions were initiated by the donor in a traditional project form, premised on contracting a team of 'experts' to deliver a discrete program with perceived discrete boundaries of time and place, the success of which would be determined by a final independent evaluation. The donor agency staff involved did support the use of a DBR approach and facilitated a degree of iteration in intervention design, and critically the budget (despite barriers to doing so within their organizational systems). However, organizational requirements for adherence to an RBM approach were still imposed. A Results Framework, inclusive of a results diagram and measurement table, was required. This was positioned as the "tool in managing for results"; this included reporting, tracking progress, and ultimately evaluating success against (MFAT, 2013, p. 3). The donor understood the results diagram as providing "a visual representation of how the outputs will lead to achievement of the outcomes and ultimately the goal", and is expected to be a vertical diagram of discrete outputs and outcomes (without any overlap) that 'logically' lead to the overall goal (MFAT, 2013, p. 4). Results measurement tables include indicators and targets that must be clear, measurable and used to "drive performance" (ibid., p. 9). The donor's organizational guidance was explicit in directing implementers to "keep it simple" (ibid., p. 9). The Results Framework was the primary document attached to the delivery contract for the interventions, and thus represented the key mechanism through which the donor at an organizational level managed and understood the interventions.

4 Marrying Design-Based Research and Results-Based Management: Opportunities and Challenges

In implementing the interventions, we were therefore faced with trying to marry the donors' results-based management approach with the adaptive approach of DBR. In many ways, this provided valuable opportunities for keeping learning and accountability central to implementation. The DBR approach positioned the achievement of improved student learning (as measured by classroom based assessment) as the shared goal and primary rationale for

all activities within the programs. This enabled program participants to stay focused on the ultimate outcome while adapting along the way, and aligned with the results agenda of using evidence of specific, measurable changes to 'drive' implementation. As Barder and Ramalingam (2012) have argued, adaptive approaches require a strong system for collection and analysis of data about 'results':

> Our point is that there is no contradiction between an iterative, experimental approach and a central place for results in decision-making: on the contrary, a rigorous and energetic focus on results is at the heart of effective adaptation.

Because the interventions were at inception aid projects tied to a results-based management framework, the intervention teams involved those overseeing (and experienced in) the application of a DBR approach as well as dedicated MEL advisers. However, the DBR approach demanded that data collection, analysis, and use of evidence to inform next steps was an explicit role of all team members, not siloed to that of the MEL adviser. This supported a strong focus on the evidence base, and on building evaluative capacity both amongst the participating schools as well as the implementing teams. Use of the DBR methodology enabled the interventions to overcome common challenges in meeting RBM requirements including limited availability and reliability of data, perverse incentives towards 'short-termism', and doing what is measured rather than what matters (Eyben, 2013; Organisation for Economic Co-operation and Development [OECD], 2014). Evaluative processes of classroom-based formative assessment and collective sensemaking of student data were not just an added task required for MEL, but core intervention strategies for teacher professional development and fostering changes in practice.

However, while bringing DBR and RBM together led to some positives, many tensions arose that are relevant to the wider discussion of developmental evaluation. Having described the nature of MEL within the case study interventions, we will now explore some of these tensions. While these tensions are common to most M&E endeavours in international aid, they are amplified in developmental evaluation and the use of a DBR approach that is context responsive.

4.1   *Seeing Is Believing*

A fundamental tension in marrying DBR and RBM, relates to the aforementioned issue of how interventions are conceptualized. As noted above, while ostensibly the DBR and a relational approach was embraced by the donor, with

the Results Framework serving as the key contractual and reporting document, institutionally the interventions were 'seen' and therefore valued largely through a RBM lens.

This was demonstrated through the process of drafting the MEL frameworks and Results Frameworks for each intervention, or as Eyben (2013) describes them "results artefacts" (p. 6). The MEL frameworks described the ethos of the DBR approach and the commitment to ongoing learning and adaptation that underpinned the interventions. These were accepted almost without comment by the donor. However, the Results Framework, specifically the results diagram and measurement table, were interrogated in detail by the donor. Numerous changes were requested to targets and indicators, primarily to ensure they were quantifiable, before they were finally approved. As noted above, it was the Results Framework that was attached to the contractual document, representing the dogma that clearly specifying indicators and targets would ensure accountability for results. As a result, a disconnect developed, between what quickly became a 'necessary evil' of reporting to the donor against the Results Framework in an achieved/not achieved fashion, and the 'real' accountability of the intervention that took place within the collective processes of sense-making, learning and adaptation with intervention stakeholders. These processes were largely invisible within the Results Framework, and therefore, at an organizational level were not 'seen' and valued by the donor as critical intervention outcomes in themselves.

4.2   *Relational and Mechanistic Notions of Accountability*

The second tension that emerged is between relational notions of accountability and mechanistic notions of accountability based on principle-agent thinking (Eyben, 2008, p. 2013). The researcher-practitioner partnership, and the recognition that the intervention teams are part of the context and are learners, demands a relational understanding of accountability, one in which responsibility to one another for meaningful change is central. Described by Johansson-Fua (2017) using the Tongan concept of *mafana,* this perspective emphasises building a sense of togetherness through co-construction and affirmation of the strengths of program participants and the context, as necessary to generate shared action and as a means for building mutual responsibility for results that are meaningful and valued in the context. This relational understanding of accountability also positions self-reflection and reflective dialogue as central to both accountability and adaptation. From a relational perspective therefore, intervention teams' accountability is for the integrity of the intervention within context, not adherence to a simplified, quantified Results Framework.

While there were strong relationships with individual staff of the donor agency who demonstrated support of and desire to engage with more relational processes of accountability, organizationally there was limited permission space for them to engage in such ways and for this form of accountability to be valued. This meant that the donor was unable to learn fully from the process, and remained reliant on simplified evidence of quantifiable results to assess the value of the intervention. Organizational concern for the 'independence' of results and evaluative data was also in tension with the co-design and developmental evaluation approaches of DBR. As stated by the donor, "Evaluation provides independent evidence to examine the results and impact of our aid investment" (MFAT, n.d.). This clearly positions evaluation as a task to be carried out towards the end of a program, by independent evaluators contracted by the donor agency. The findings of such evaluations are privileged above evaluative information that emerges through implementation. In the context of limited resources, this leads to a devaluing of both important learning and evidence of results, as well as a devaluing of relational accountability. DBR distinguishes itself from action-research in its explicit use of quasi-experimental research design and commitment to both rigour and integrity in data collection and analysis. In practice, maintaining rigour and integrity was an ongoing challenge, with continual balancing necessary between building capability of program participants in data collection and analysis and valuing local perspectives on what counts as improvement on the one hand, and ensuring robustness of evidence on the other. We did not always get this right. However, it is questionable that some form of ex-post evaluation undertaken by independent contractors would provide more reliable and meaningful data. This tension between relational accountability and independence goes to the heart of issues of power in determining what counts as evidence, which will be explored further below when discussing use of indigenous methodologies.

4.3   *Resourcing*

The third tension, which has been touched on throughout the discussion so far, relates to resourcing. While attempting to marry DBR and RBM brought greater resource to evaluative processes within the interventions, it also generated a heavy burden. The developmental evaluation and relational approach of DBR required ongoing data collection and, in particular, systematic documentation of evidence-informed adaptation, referred to by Wild and Ramalingam (cited in Ramalingam et al., 2019, p. 2) as "adaptive rigour". Also required, however, was prioritizing working in relational ways to maintain *mafana* (relational accountability), which in contexts that privilege face-to-face and

oral communication, was an ongoing challenge. Added to this was the layer of results reporting in a manner that met donor requirements.

Pasenen (2017) emphasizes the importance of bigger budgets for effective MEL in adaptive approaches. However, the most necessary resource is time which is always a scarce resource, particularly in the context of a researcher-practitioner partnership working with schools where intervention implementers and participants have busy lives outside the bounds of the intervention. The experience from the case studies is that time was not always available, specifically in terms of time devoted to documenting the nature of the relational and adaptive processes of the intervention in ways that the donor agency could 'see' and therefore 'value'. The question of whether aid agencies are ready to invest in productively marrying the strengths of a result focus with that of adaptive implementation approaches, and to value relational accountability, is critical. As we know from experiences with adopting participatory and partnership approaches, such investment requires not only political will but a shift in organisational culture and systems, without which we run the risk of marriage on paper only.

5   Valuing Indigenous Epistemology and Methodologies within Intervention Design and Evaluation

We have discussed three key tensions that arise when attempting to marry DBR with RBM approaches, specifically relating to how interventions are conceptualised, relational accountability, and the resourcing of learning. These tensions, and others, come into sharp relief when considering the valuing of indigenous epistemology and use of indigenous methodologies within aid-funded interventions. We will explore this issue now, with specific reference to the application of an indigenous methodology called *tok stori* within Temotu Literacy Support and its successive intervention in the Solomon Islands. We begin with a brief overview of the importance and nature of indigenous epistemology and methodologies for aid interventions generally, and evaluation specifically.

5.1   *Why Indigenous Epistemology?*
We contend that the privileging of indigenous epistemologies and research/ evaluation methodologies is a corollary of a contextually responsive, learning focused intervention approach, such as DBR. Further, it concurs with our earlier contentions that evaluation is primarily a pedagogical activity, and that pedagogy and learning are culturally/contextually contingent. In international aid generally, and education aid in the Pacific specifically, for too long projects

have come and gone framed within non-indigenous epistemologies and using non-indigenous methods for diagnosing problems, generating solutions, and evaluating success. Such approaches have resulted in furthering a sense of colonization of Pacific indigenous peoples, and positioning indigenous knowledge forms as inferior to other research or evaluation methods (Smith, 1999; Taylor, 2003). Yet, these imposed methods, based on positivist western scientific traditions, have been found to be ineffective in terms of their applicability and sustainability within indigenous contexts (Gegeo, 1998). The privileging of local and indigenous knowledge, epistemology, and methodologies is therefore argued as critical for ensuring intervention design, implementation and evaluation processes are grounded in the world views and practices of participants (Hurworth & Harvey, 2012; Johnston-Goodstar, 2012; LaFrance & Nichols, 2010). More importantly however, as expressed most powerfully by Linda Tuhiwai Smith (1999), the honoring and privileging of indigenous knowledge is about decolonizing research, and by extension other knowledge generating activities such as evaluation. It enables indigenous people to become active agents in the theorizing of their worlds and experiences, and for this to form the basis of intervention design and evaluation (Gegeo, 1998; Smith, 1999). From this perspective, privileging indigenous epistemology, and the space for indigenous people to theorize and generate new knowledge, is consistent with the context responsive philosophy of DBR.

Putting this into practice within aid-funded interventions involving both 'insider' and 'outsider' researcher-practitioners demands that all involved understand and accept several considerations. It also raises important questions about how best to ensure the validity and legitimacy of indigenous knowledge, particularly in the processes of dissemination that are so critical in proving the 'value' of an aid intervention. These are outlined below, and then explored further through the practical example of the use of tok stori.

5.2 *Considerations in Valuing Indigenous Epistemology and Methodologies for Evaluating Aid Interventions*

First, we need a clear understanding and appreciation of what is meant by indigenous knowledge and epistemology. Gegeo and Watson-Gegeo (2001) define indigenous epistemology as "a cultural group's way of thinking and of creating, reformulating, and theorizing about knowledge via traditional discourses and media of communication" (p. 55). The authors further contend that, "Indigenous critical praxis refers to people's own critical reflections on their history, knowledge, political, economic and socio-political context in which they are living their lives; and then their taking the next step to act on these critical reflections" (Gegeo, n.d., cited in Gegeo & Watson-Gegeo, 2001, p. 59).

Thus, indigenous critical praxis not only honors people's epistemological world views, voices, knowledge and experiences, but creates space for these to inform further learning and review of these epistemologies.

Understanding indigenous epistemologies and knowledges in a Pacific Islands context requires particular attention to the differentiation between the concepts of 'knowledge' and 'knowing', and the contexts and formats where this knowledge and knowing are accepted, valued and validated. Again referencing Gegeo and Watson-Gegeo's (2001) writing of indigenous knowledge in the Melanesian context of Solomon Islands, "knowledge is socially constructed by communities of knowledge makers" (p. 62); in other words, knowledge is created collectively by community of knowers rather than by independently knowing individuals. The authors further assert that in indigenous contexts, knowledge is theorized, constructed, encoded and passed on through generations collectively within a contextual and culturally specific space, and evolves, develops and is acquired over time (Gegeo & Watson-Gegeo, 2001). This socially constructed, lived, knowledge, facilitated through trial and error over time and within specific spaces, is the knowledge type that counts in indigenous evaluation and research.

An understanding of the place and role of the language of communication is another important consideration in indigenous methodologies. This is particularly important in the case of Solomon Islands which presents a complex and diverse cultural and linguistic context with 71 active vernacular languages, in addition to English as the official language and Solomon Islands pijin as the language for social interaction (see Chapter 6). The ability to communicate in a familiar language is critical when conducting research and evaluation with indigenous groups. It is essential to facilitating a space and process for knowledge sharing and generation by and for indigenous participants (not just for the researchers) in a manner consistent with, and affirming of, their ways of knowing, and thereby ensuring the integrity and authenticity of meanings.

Indigenous literacies in non-written forms are widely acknowledged (LaFrance & Nichols, 2010). In Pacific indigenous cultures, communication and knowledge sharing is done mostly through oral forms and there is less emphasis on the written form (Sanga & Reynolds, 2018). In this context, much knowledge or information is latent; stored and recorded in the memories, minds and hearts of people and is passed on through generations in oral, practical and experiential ways. The importance of giving credence to oral forms of knowledge is highlighted by Sanga and Reynolds (2018):

> Because in Melanesia, the cultural value of oral language is higher than for written language, writing as a main pedagogical tool may not play to

> the strengths of leaders whose practice in oral communication has been
> under daily development for a long time…Reflecting people's preference
> in methodology adds to a programme's pedagogical potential. (pp. 16–17)

In these cultures, validity and legitimacy of knowledge and theories is acquired
through practice over time, across generations and through relational encoun-
ters. Indigenous ways of knowing need time to emerge and take hold, and par-
ticipants and communities themselves also need due time to fully comprehend
the learnings acquired, the processes that facilitated the learnings, and recog-
nize how these learnings become embodied within the culture (LaFrance &
Nichols, 2010). In indigenous cultures, such embodiments may take oral,
non-written and 'lived in' forms of knowledge making them harder to measure
and validate in terms consistent with the RBM frameworks dominant in aid.

   Another related consideration is that communities are not homogenous.
Different groups or members within the same community may claim owner-
ship of different aspects of community wisdom and resources. Sensitivity to the
local dynamics of knowing and knowledge, is therefore critical when engag-
ing with indigenous knowledge and using indigenous methodologies. Against
this backdrop, researchers and evaluators must ask themselves how best such
knowledge can be captured, shared, and validated by those who own and live
it (Lafrance & Nichols, 2010). The demands for sharing and documenting evi-
dence emerging from evaluation processes of an aid-funded intervention are
multiple; different stakeholders have different information needs. How best to
meet these needs while also respecting what is appropriate within the context
of indigenous practices of the sharing of knowledge raises lots of challenges.
Evaluators must also differentiate between what is known and ways of know-
ing, how it is shared with and by whom.

5.3   *Tok stori: An Indigenous Approach*
Having mapped out key questions that need to be considered when using
indigenous methodologies in evaluation, we will explore how these play out
in practice drawing on the use of tok stori in the Solomon Islands case study
to illustrate.

   In Solomon Islands, tok stori refers to a culturally and contextually authen-
tic form of group communication that serves many purposes including to:
support group decision-making and consensus building; facilitate processes of
co-construction of knowledge; co-design plans; and perform pedagogical, eval-
uative and accountability functions. Sanga and Reynolds (2018) define tok stori
as "a form of discursive group communication which allows people in-con-
text to story their lives, to use a storied approach to change and/or improve

themselves; and to story their own futures based on their storied pasts and presents" (p. 1). Tok stori thrives in an environment that is reassuring, uplifting and comfortable for all participants; an environment which provides opportunity for genuine interactions and understandings to emerge, develop, and be co-constructed within a culturally and contextually conducive learning space.

An important attribute of tok stori is that it encourages the development of relationality between participants, epitomising a culturally and contextually meaningful approach that engages, validates and upholds participants, their ideas and the relationships formed. As such, using tok stori within evaluation processes affirms the pedagogical potential of evaluation, wherein stories shared by those with similar 'lived in' experiences lead to co-constructions of meanings which in turn formulate bodies of shared and accepted knowledge, and strengthen relationships that provide the basis for future collective action (Gegeo & Watson-Gegeo, 2002; Burnett & Dorovolomo, 2007).

Having provided an overview of what tok stori is, we will now explore how it was used within the case study intervention. The examples given here draw from both the Temotu Literacy Support (TLS) case study, and a larger-scale follow up initiative that drew on the learnings from TLS.

6   Use of Tok Stori as Intervention and Evaluation Strategy: Opportunities and Challenges

Tok stori was first used as an engagement tool as part of the initial profiling and co-design process for the interventions (see Chapter 4 for elaboration of profiling). Tok stori was considered the most authentic methodology for developing and maintaining close relationships with the teachers, school leaders and education officers involved, but also for engaging them as active agents in designing and determining the nature of the intervention rather than mere participants. Those leading the tok stori were predominantly experienced Solomon Islands educators or researcher-practitioners with long experience in Solomon Islands and fluency in pijin. Having Solomon Islanders facilitate the tok stori in a familiar language meant that the tok stori enabled participants to share their experiences openly and to discuss these issues at deeper levels that touched hearts and minds. This supports Burnette and Billiot's (2015) view that indigenous researchers are more likely to convey information in a manner that is both culturally acceptable and specific to those participating in the research and of benefit to end users of the information.

Members of the school communities responded well to this methodology because the medium for communication and knowledge generation

was consistent with their ways of knowing and of sharing knowledge. They trusted the process. This trust was further reinforced by the positioning of the researcher-practitioner instigating the tok stori as a mentor rather than an expert, whose interest was primarily in developing a trustful and ongoing relationship from the interaction and creating space for the co-construction of knowledge. Important here was the intervention team's focus on engaging in tok stori for the purposes of contributing to a broader project of school communities storying their own future, rather than simply for the purposes of the discrete aid-funded project at hand. In order to establish this relationship, it was also necessary for that researcher-practitioner to have respect from and credibility with the community, therefore requiring them to possess context specific experiences and knowledge, cultural competence as well as research experience.

Tok stori also uses a less formalized structure than other qualitative methodologies, wherein conversations or discussions can be easily conducted with individuals or with groups whether in an office, classroom or another informal space. The familiarity of participants with this approach meant that participants could emulate the process through further application and by using a 'learning by doing' approach.

Further, tok stori gives equal status to all parties by allowing permission for participants to share ideas as much or as little as preferred. This flexible and seemingly unstructured approach to acquiring information means that the process can take a lot of time. However, in our experience it was effective in promoting trust-building and relationship development between the various parties, especially in communities where for a long time there has been little collaboration and much distrust between school leaders and community members. The slow but considered pace allowed for tok stori is beneficial in that it "allows surface and deep levels of understanding to emerge" (Sanga & Reynolds, 2018, p. 1).

Critically, tok stori was effective within the case study interventions because it promotes a relational approach and supports the need for strengthening of relational dynamics. Such relationships are only possible where information and knowledge is shared and created within a "natural cultural context" (Burnett & Dorovolomo, 2007) through use of a common language that participants can engage in comfortably and honestly allowing the good, bad and the truth to come out. When people feel they can be genuine and honest in their communication and ideas, they get a sense of release and power in the ability to share and disclose their innermost thoughts, ideas and feelings. The interaction occurs in an environment that is perceived to be equal and conducive to productive discursive communication between and amongst all parties.

As TLS developed, and in the evolution of the subsequent intervention, it became clear that tok stori needed to be at the heart of the intervention methodology. It was accepted as a culturally and contextually authentic method for growing leadership development, professional development and generating collaborative action by schools and communities (key objectives of the interventions), as well as for collecting and making sense and shared meanings of and from the data. Tok stori therefore became the main methodology used in the cycles of data collection—from profiling to sensemaking (see Chapter 3) with teachers, school leaders and community members. It was also the methodology used within the intervention teams to collectively make sense of our experience and observations, to story our next steps within the intervention, and to foster our own learning. Tok stori has also been used to develop and record 'stories of change' with those involved in the intervention, both to inform progress towards valued outcomes and to disseminate evidence of change. In this sense, tok stori has served as a qualitative measure to describe change relative to baseline at school and education authority levels. In summary, tok stori served multiple functions within the interventions, including the ongoing evaluation and iterative design of the interventions.

Our experience has found tok stori to be invaluable for supporting learning and change within the intervention, as well as for generating shared evaluative knowledge *of* the intervention. However, a key challenge has been in legitimizing this knowledge and process within donor accepted instruments for determining and valuing results and evidence. As discussed earlier in this chapter, results-based management tools of Results Frameworks and Measurement Tables, and the assumptions that sit behind these, impose limitations on the telling and documenting of the whole 'picture and story' of the intervention. This undermines the robustness and vibrancy of tok stori data and information which is embodied and lived, its power residing in the processes of people participating in the identification of problems, co-creating the solutions, and reflecting on the outcomes. Linking to the tension raised earlier between resourcing of learning versus resourcing of documenting 'results', the intervention teams often invested more in engaging people in tok stori. It was seen as a more powerful strategy for collectively evaluating, and learning from, the intervention, than a written report or table of quantitatively measured result indicators. Thus, tok stori facilitated a developmental evaluation approach, argued earlier as a necessary corollary of adaptive approaches such as DBR, in which evaluation serves a pedagogical function and promotes relational accountability. However, the challenges in documenting and communicating this in a form that can be 'seen' by the donor and wider stakeholders have been significant and not yet resolvable.

7   **Conclusion**

In this chapter, we have explored the implications of a design-based research approach for the evaluation of aid-funded interventions. We have argued that the principles of context, learning and relationality that underpin DBR lead to a blurring of intervention and evaluation, and necessitate the privileging of relational accountability, indigenous epistemologies, and a relational process of learning. The tensions that arise when attempting to integrate such principles within the results-based management framework of a donor agency have been explored. The case study interventions demonstrate the potential for productively navigating such tensions, at the same time as highlighting where resolution is still needed. Ultimately such resolution will come from the humility to accept complexity, and the subsequent demand for prioritising relationships and learning.

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CHAPTER 10

What Does Relationality Mean for Effective Aid?

Rebecca Spratt

Abstract

Education development has been a longstanding focus of international aid. The effectiveness of international aid for education development is an ongoing area of research and critique, running in parallel to debates about the effectiveness of aid in general. A key line of critique of the management of international aid is the disjuncture between the linear cause-effect, planning-centric, managerial view of development and social change that dominates international aid institutions, and the complex and dynamic real-world contexts to which aid relates. Common critiques of aid for education development are effects of these same issues, such as the over-emphasis on 'controllable' inputs and top-down policy or regulatory reform based on assumed global 'best practice', while neglecting the actual processes of teaching and learning within classrooms and the contextual variability of those processes.

Underpinning these critiques is a more systemic issue of how international aid institutions think about the world; to paraphrase Eyben (2010, p. 385), predominantly a substantialist mode of thinking which considers the world in terms of pre-formed, bounded entities that can be described, categorized, and ordered. This contrasts with a relational mode of thinking, which is more concerned with processes and relationships, and engaged in the complexity and contingencies of practice, perspectives and politics (ibid., p. 383). The implications of a relational way of thinking and working for aid management are explored in this chapter, drawing on case studies of the aid-funded education interventions explored throughout this book.

1   Introduction

Since the late 1990s, the dominant paradigm in international aid—of planned, external interventions to achieve pre-determined results—has been critiqued as inadequate for addressing the complex problems in different aid contexts. At the crux of the dissatisfaction with the managerial and technocratic orthodoxy of aid, is its inability to deal with the problem of context; its dislocation from the unending diversity and complexity of 'real' life, of everyday practice. Such a critique is not exclusive to aid; it has been attributed to social policy more generally, and education specifically. Strategic plans, evidence-based policies, best practice governance structures, and well-designed interventions are persistently seen to fail in the face of context, with such failure typically blamed on people acting 'not as planned' within context. This chapter contends that the so-called failure of aid relates to an inadequate theorizing of context, which relates to the substantialist underpinnings of aid. In contrast, a relational perspective, as promoted by complexity and systems theory, and integral to the epistemologies of many recipients of aid including those of indigenous Pacific peoples, will be explored as offering an alternative account of social continuity and change. Also explored are the implications of a relational approach to aid, using the case study examples, concluding with an argument for harnessing the value of both relationalist and substantialist perspectives for aid.

This chapter comes from the experience of having worked as a manager of education aid for some years, during which I have continually grappled with the practical and ethical challenges that arise when attempting to enact principles of complexity and relationality within the workings of aid agencies. The chapter was stimulated by my ongoing dialogue with colleagues about the limitations of the current ways of thinking and doing that dominate aid management, and is an attempt to provide a theoretical framework for understanding why this is, despite the common knowledge that such ways are unhelpful at best. The paper is also in response to a dissatisfaction with the argument, and indeed common practice, that working in relational ways needs to remain 'hidden', with aid workers forced to subvert the system in order to work in relational ways (Eyben, 2010). Instead the paper's conclusion takes a relational perspective, arguing for valuing the dialectic of substantialist and relational perspectives on aid.

2   The Problem of Context in Education Aid

The concept of context occupies a central place in both the comparative education and international aid fields. As Cowen (2006) argues, comparative education:

> [...] always deals with the intellectual problems produced by the concept
> of context (the local, social embeddedness of educational phenomena)
> and transfer (the movement of educational ideas, policies and practices
> from one place to another, normally across a national boundary); and
> their relation. (p. 561)

Countless research papers, program evaluations and individuals' experiences
demonstrate that deep understanding of and engagement with context is crit-
ical for the design and implementation of international development inter-
ventions, including those focused on education (Samoff, Leer, & Reddy, 2016).
The 'problem of context' has received particular attention in recent years in
relation to teaching and learning interventions, where empirical research has
provided overwhelming evidence that context matters, and that teaching and
learning are contextually contingent (Guthrie, 2011; Tabulawa, 2013). As Vavrus
and Bartlett (2012) argue:

> Ways of knowing about pedagogy—including those ways sanctioned
> through government-sponsored teacher education programs and non-
> governmental professional development projects—are inextricably
> linked to, and constrained by, cultural, social, and material contexts.
> From this perspective, theories of knowledge and knowledge production
> occur within and are shaped by context; epistemology is local rather than
> omniscient. (p. 638)

Furthermore, research has identified a lack of attention to context as a key
reason for limited impact and/or unsustainability of reforms and interven-
tions aimed at improving learning and teaching in 'developing' country set-
tings (Crossley, 2010). Context has been shown to matter at multiple levels: at
the level of epistemology, of what defines effective teaching and valued learn-
ing in the classroom, as well as 'what works' in terms of interventions aimed
at changing existing teaching and learning practices in schools (Vavrus &
Bartlett, 2012). As a result, there has been a shift over recent decades in both
the international aid and comparative education fields towards seeking out
contextually appropriate 'best fit' rather than a universally generalized 'best
practice' (Coxon & Munce, 2008; Crossley, 2010).

However, while there has been an increasing recognition of the importance
of understanding context and designing aid interventions for context, this is
typically based on a limited theorizing of what 'context' as a unit of analysis is
(Cowen, 2006; Dilley, 1999). Looking through aid program designs, reviews or
reports reveals that context is most often treated as a set of describable features

of a bounded place/space, which, once described, are either to be responded to or to be placed in the risk matrix to be managed and mitigated. This conceptualization of context presumes that context is bounded; that it is possible for the aid manager or consultant to 'know' the context and to develop a unitary, coherent analysis of that context in a documented form, from which contextually appropriate actions and reactions can be deduced (Stephens, 2007).

Such a perspective emerges from the epistemological underpinnings of international aid, which persistently:

> ...emphasizes universal over contextual knowledge, a knowledge system that is deductive and oriented to general predictive models, and that constantly organizes attention away from the contingencies of practice and the plurality of perspectives. (Mosse, 2011, p. 87)

This knowledge system, which underpins not only international aid but is a fundamental element of the tradition of western liberal philosophy and science, has been usefully described as substantialist (Emirbayer, 1997). According to Eyben (2010), "A substantialist perspective sees the world primarily in terms of pre-formed entities in which relations among the entities are only of secondary importance" (p. 385). Substantialists see the world in terms of entities, to which specific characteristics are ascribed and predictions made about how those entities will behave, as well as how they will relate to other entities. The preoccupation in international aid discourse and practice with categorizing, classifying, and predicting—as manifested in log frames, stakeholder analyses, and endless labelling such as in the dichotomies of rich and poor, developed and developing, is the result of a substantialist perspective. From a substantialist viewpoint, the problem of context is solved by obtaining a sufficiently comprehensive knowledge of the social, political, and cultural institutions, and the actors within a context, and of the inter-relationships between them, from which predictions can be made as to how they will behave and be influenced. A substantialist account does not deny the importance of relationships and interdependencies between entities, and the way in which entities are influenced and shaped by such interactions. The key feature of substantialism is that it always begins with the entity; relationships are secondary.

3   A Relational Perspective on Aid

In contrast to this dominant substantialist perspective on context, is a relational perspective on the world in which things (people, communities,

identities, institutions, structures) "are understood and observed as they relate to or are a function of other things" (Eyben, 2010, p. 387). The elemental unit of analysis becomes not the things themselves, but the relations between them, which are "seen as a dynamic, unfolding process" (Emirbayer, 1997, p. 287). Similar to substantialist perspectives, relationality has a long history in western liberal philosophy dating back to the Greeks and has been the pre-eminent mode of understanding the world in a number of other philosophical lineages, including those of the indigenous peoples of the Pacific region. Many Pacific scholars have written about the primacy of relationships and relating within Pacific epistemologies, in which there is greater concern for "meaning and relevance than with classification and definitions" (Thaman, 2003, p. 165), and the way in which relationships between people, cultures, and the natural environment provide the space through which meaning is continually created and recreated (Johansson-Fua, 2016). The absence of separation between knowledge and the knower, and the connections across time and space prominent in the indigenous epistemologies of many Pacific peoples exemplify relational ways of understanding the world (Gegeo & Watson-Gegeo, 2001).

Importantly, relationality is more than just giving attention to relationships. While the importance of relationships in aid is well accepted, typically this is from an instrumentalist perspective; having 'good' relationships between aid donors and recipients is useful for achieving development outcomes (Eyben, 2010). Relationality, however, means taking relations as the "point of departure" for enquiry into and accounts of the world (Dillon, 2000, p. 4). It is about focusing on relations as "pre-eminently dynamic in nature, as unfolding, ongoing processes rather than as static ties among inert substances" (Emirbayer, 1997, p. 289). Here, the ideas of complexity and systems theories[1] are helpful in further articulating a relational perspective on the world. I use 'complexity and systems theories' here to describe a collection of principles, ideas and frameworks that are highly inter-disciplinary and that since the mid-20th century have become a recognizable alternative, or at least complementary, paradigm to the dominant reductionist model of a predictable world in which change occurs through linear causality (Ramalingam & Jones, 2008). These approaches, which have gained much attention within aid and education over the last 10–15 years, view the world in terms of complex, unbounded systems in which the components are interconnected and defined by their interactions with each other, rather than by properties of the components themselves (Kuhn, 2007, p. 182). The patterns of change and continuity in society are therefore a result of these interactions, and operate in non-linear, adaptive, and emergent ways (Ramalingam & Jones, 2008). In particular, the primacy of relations and principle of emergence means there is "no guiding central hand

in the evolution of the system" (Snyder, 2013, p. 11). A relational perspective on the world therefore also demands a focus on understanding the world by what *is,* rather than on predefined expectations of what *ought to be* based on assumptions of how entities will behave and for what purpose.

Therefore, complexity and relationality approaches as conceptualized above, and their attendant focus on practice and process, represent a fundamental challenge to the substantialist perspective dominant in aid. Again drawing on Eyben (2008), if we are to take a relational approach to aid:

> It would mean us making sense of 'aid' not just as a thing in itself— money and technical cooperation—but also as patterns of social relations that both shape and are shaped through the giving and receiving of money and people. From this perspective, it is these 'social connections and relations' to quote Karl Marx that are what constitutes the international aid system—connections and relations that tend to get neglected through a substantialist focus on the resources and the architecture. (p. 9)

Similarly, as Sanga has argued, the dominant "bricks and mortar" mentality of aid focused on modalities and structures, can be contrasted with a relational perspective of aid as fundamentally a relational process of "people giving to and receiving from each other" in which Sanga (2016) (rhetorically) asks "might it be that we (aid givers) are changed by our encounters with aid recipients? Might it be that the flow of transformation is not one-way?" (p. 12).

Accepting the "radical relationality" (Dillon, 2000, p. 4) that underpins complexity theory therefore means not just seeing relationships as useful instruments for achieving change or adopting 'adaptive management' techniques to better manage a complex and diverse, yet always bounded and statistically definable, context. A relational lens requires a re-conceptualization of context. A relational perspective reframes context as much more than a static entity which aid agencies can describe and reduce to a set key features from which particular actions or reactions are inferred. Rather, to quote Dilley (1999), context is "a process or set of relations, and not a thing in itself" (p. 5). It demands less effort on setting boundaries and categorizing contexts in order to then predict, plan, and manage these entities. It demands more effort into engaging deliberately and self-reflectively, within ever-dynamic webs of relations. Ultimately, a relational perspective encourages a recognition that it is not the forms of aid that matter—the projects, the budget support, the policy dialogue—but the relational space created within and through relationships of aid (Sanga, 2016). From this perspective, it is the relational processes that are involved in the 'business' of aid that lead to change, not the entity of aid itself.

Critically, a relational perspective on context demands that aid agencies and those who design, manage, and implement aid projects recognize themselves to be part of the context, not separate from it. This challenges the historically prevalent positioning of the 'recipients' of aid as reliant on external consultants and advisers to bring necessary knowledge and expertise for development. From a relational perspective, the 'experts' are also learning and changing through the relational processes of aid. To bring this back to the themes informing this book, a key implication of what relationality means for aid is the importance of self-reflection, of learning and of humility (Baaz, 2005; Sanga, 2016).

4   The Tension of Relationality in Education Aid

I have outlined what a relational perspective is and what it might mean for aid. In the final section of this chapter, I will explore the potential for relationality to gain greater sanction within education aid, and the challenges involved, using the case studies as illustrations. As noted at the start, many aid workers and programs embrace relational perspectives. However, such practices have historically not been supported, or even sanctioned by, the management systems and dominant discourses of aid (Eyben, 2010). But are we beginning to see a change in official aid discourse, and if so, what practical challenges and possibilities does this bring?

In recent years, there has been a visible shift in education aid discourse, from grand plans and static log-frames to iterative, adaptive management with regular feedback loops and local-level problem solving, designed to respond to the emergent properties of context and political dynamics. As one example, the Australian government, the largest aid donor in education in the Pacific region, in its strategy for investment in education states that "education systems are complex and interdependent" (Department of Foreign Affairs and Trade [DFAT], 2015, p. 9), and recognizes system-based approaches and "fit for purpose" investments that are "grounded in context, politically responsive, flexible" as key principles for effective education aid (Mc Nichol, 2017). Notions of co-design, collective impact models, coalition building, and 'locally-led problem solving' are increasingly framed as the new and better version of participatory development, effective relationships and ownership.

The case study interventions drawn on for this book are examples of this shift, using adaptive approaches, co-design processes, principles of relationality and context, and a focus on the integrity of implementation rather than fidelity to a pre-determined design. The New Zealand government's

willingness to invest in a design-based research intervention that required an iterative approach and deliberate resistance to specify solutions at the outset (as elaborated in Chapter 4), suggests an increased acceptance of principles of complexity and relationality in education aid. This was further affirmed by the same donor's decision to support follow-up larger-scale interventions in Solomon Islands and Tonga which took these principles further. The interventions focused on outcomes that are valued and meaningful within the context and identified through relational processes of researcher-practitioner dialogue.

While the interventions were explicitly aimed at improving children's literacy learning, equally important were the relational processes for determining pathways to change. Critical within these was affirmation of people acting in relation to others and applying their agency to direct activity and change, rather than simply to participate in a pre-planned program. Described by Veikune as the "weaving" of academic and practical knowledge (as elaborated in Chapter 7), the co-design process based on locally collected and meaningful data ensured interventions were "woven with rather than for school communities" and recognized that "teachers' knowledge about what sits behind the data is essential to weave into the analysis alongside 'outsider' researchers' interpretations" (Veikune & Spratt, 2016, p. 77). A belief in the emergence and power of peoples' adaptive capacity in context underpinned the intervention. In practical terms, this meant investing in relationships and, critically, in processes. Processes which allowed for dialogue, collective reflection, and sense-making as means to determine next steps within the (imagined) bounds of the program. But importantly also to provide space for those involved to (re)create their ways of relating to and in the world, all be it in ways that may or may not 'count' towards the reported objectives of the program. This involved a fluidity and blurring of boundaries such as insider-outsider (Chapter 3), knowledge and knowing (Chapter 9), that required continual negotiation by those involved. Such an approach required adaptive management and a high degree of trust by the donor; a willingness to invest in relationships and processes of shared learning, rather than in pre-defined inputs and outputs.

However, although there is increasing recognition within education aid discourse of the need for complexity aware and relational practices, there continues to be a tension with the continued power of substantialism in aid management. There is a risk that the principles offered by complexity and systems theories are being adopted as yet another form of orthodoxy of 'what works'—another set of tools that can be applied in standardized ways to achieve the results they have set out to achieve. Some of the leading proponents of complexity theory in international aid foreshadowed this risk when highlighting their conundrum in developing a 'toolkit' for how aid agencies

can adopt complexity approaches, recognizing that doing so is antithetical to "the whole point of complex systems that you can't have standard approaches" (Green, 2014). Increasingly, aid managers and implementers are encouraged to plan for adaptation and emergent change, build coalitions, and include performance indicators for being responsive to context. As such, the principles of complexity are absorbed into the prevailing managerial framework of aid, while leaving behind their 'radical relationality'. Still assumed is the dichotomy between those who design and deliver aid, and those that are to be changed by aid, and the ability of the former to plan and manage the 'development' of the latter. Aid workers are thus still seen as external to the context they are working within. Relationships are again instrumentalized as tools for effecting change, rather than seen as expressions of the relationality which gives meaning to, and is a primary force for shaping, our world.

The interventions explored in this book also serve to illustrate the challenges in trying to integrate relational approaches within the framing of development afforded to an aid-funded project. As was explored in Chapter 9, while those involved in the interventions (including aid agency staff responsible) were attempting to promote relational ways of engaging, this ran in continual tension with a need to conform to substantialist expectations. From a personal perspective as program manager, the experience required continual negotiation between a desire to trust in process and the value of adaptive learning, while also managing a sense of accountability for ensuring results were achieved and, in order to justify the expenditure of donor funds, to attribute such results to the success of 'the program'. Thus, program documentation and reporting adhered to articulations of linear causality, suggested predictive ability, and managerial capability to manage risks of politics, relationships and 'contextual' factors to the achievement of development outcomes. As such, there was a disconnect between the written reports and the practice on the ground. This also fed into the often felt disconnect between aid agency staff based in-country who may be more observant to, and more supportive of, relational practices, and those in the head offices who are reliant on written reports and measurable indicators to assess success. This disconnect creates tensions in practice, but more importantly (as discussed further below), distorts understandings of 'what works' and limits learning.

Thus, even with some adoption of complexity ideas into education aid discourse, there is a continued drive for standardization of aid management, and for aid agencies to remain "the drivers of aid form" (Sanga, 2016, p. 10), as well as the arbiters of context. This runs in constant tension with the relational ways of seeing and engaging in the world of many "front-line" workers within aid bureaucracies and those they work with (Eyben, 2010, p. 383). In my own

experience, the felt impact of this tension is actually amplified when relational ways of working are recognized as valued but not supported in practice.

5   Navigating the Tension

Eyben concludes that to maintain effectiveness of aid requires relational ways of working to remain 'hidden', arguing that, "Practitioners need just sufficient encouragement from top management—as well as from relational advocates like myself—to continue subverting the system for the system's benefit" (Eyben, 2010, p. 394). However, such an approach places the onus, and risk of discipline, on individuals and those they are working with, particularly in the context of regular rotation of agency staff, short timeframes for interventions, and an almost unavoidable disconnect between aid staff in the field and their senior management residing in head offices. As explored in Chapter 9, 'flying under the radar' can enable relational approaches; however, this means that such ways of working are never 'seen' or learned from at an organizational level, and often are lost with the next change in aid staff. As Tamas (2007) argues, "Front-line workers' discretional relationalism prevents the institution of aid from becoming more accountable—and by implication more effective" (cited in Eyben, 2010, p. 392).

It can also be argued, however, that surrendering completely to uncertainty and unending contextual contingency would undermine the useful functions that substantialist practices of standardization and ordering play in enabling public sector agencies to provide for citizens' needs (Ramalingam & Jones, 2008; Stears, 2012). Such practices have value and are arguably necessary for the continued functioning of aid as an instrument of public policy (Eyben, 2010). Promoting a relational approach does not mean a complete abandonment of substantialist perspectives. As Fein (2015) has argued, "Rather than calling for an ontological either or choice between them…[we could]…come to see both views as complementary approaches, both contributing to our knowledge and understanding of complex phenomena and their dynamic interrelations" (p. 106).

It is this position that I would like to suggest as a constructive way forward; a middle ground where relationality at an epistemological level is explicitly valued. Moreover, that active efforts are made to consider the implications of relationality not just in instrumental terms but in terms of the fundamental ethics and values underpinning engagement in aid across contexts. Critically, this requires of those working in aid self-reflection, humility, and a willingness to be positioned as learners, learning *from* context. This means accepting the

challenge as articulated by Sanga's (2016) pertinent questions: "In our aid giving, are we willing to be truly changed by our encounters? Or are we merely recruiting more people to our ways of seeing the world?" (p. 13).

Note

1   While complexity theory and systems theory are combined for the purposes of this chapter, it is important to note that they are distinct (see Ramalingman & Jones, 2008, p. 5 for a useful summary of the distinctions). Further, the use of complexity theory here, rather than the also commonly used complexity science, is a deliberate decision given this chapter's interest in the broader set of principles related to complexity that can be found in postmodernism and post structuralism, as opposed to the more narrow application of complexity science used within the physical sciences and mathematics.

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Afterword

Konai Helu Thaman

For me and many Pacific Islanders, who have had to endure learning and later teaching in the language of strangers for a good part of our lives, this book is a timely reminder about why formal education failed and continues to fail so many Pacific learners. When I attended high school in Tonga and university in New Zealand in the 1960s, my struggle in the classroom not only had to do with the foreign content of the lessons but also with the values that underpin what was going on between teacher/lecturer and student; between student and student; and between students and the wider community in which I found myself. It was not until I returned to Tonga and was told to teach English to a Form 5 class of repeaters that I realized what was going on and why most of the students in my class had failed English the year before. The intervention by teachers and most school personnel in their attempt to help students seemed to have missed the mark given the culturally undemocratic nature of the school curriculum as well as most of the teaching that took place. As a new teacher, I knew very little about the importance of (cultural) contexts, the role of relationality in the life of learners, or how indigenous students learn, and of course the need for contextualization of content, methods, assessment and the teaching/learning process itself. That the themes of context, relationality and learning permeate this book should make it easier for teachers and other educational personnel, to understand the learning problems of students whose mother tongues are not English and/or whose home cultures do not identify with Anglo-American or European cultures.

I applaud the work that was carried out by the authors of this book, researchers and practitioners from USP and UoA, some of whom, like me, experienced decontextualized teaching and learning both in terms of content selection as well as the value underpinnings of the knowledge and skills that were emphasized in the teaching-learning process. The focus on the framing of contexts and methodologies, learning from human development as well as learning from international development seems appropriate given the concerns of our time in relation to global as well as local action and implementation of what are now seen as key sustainable issues impacting our region, Oceania.

The study sites used to collect the research data are also illuminating and provide similarities as well as differences about the impact of the educational literacy intervention (selected by the researchers) on the learners and teachers. I particularly like the focus on relationality as a key value for all the things that

are important for defining the indigenous people of Oceania. It is the main rationale for the different behaviors and performance of indigenous people—their relationships with one another as well as all things in the environment including the land, sea and sky. Focusing on relationality has been the missing link in most educational and other interventions that developed nations had planned (or are planning) for our various countries. Better understanding the importance of relationships and the need to contextualize education, for whatever cause, is a key element for success.

The book also illuminates the need for change agents to better understand the complexities of whatever it is that they are responsible for changing—in this case, literacy and language development—especially in bilingual or multilingual contexts. The assumption that literacy in different contexts (be it social, textual or cognitive) requires the use of language that will bring about meaningful results is a very good one, and the conclusion that literacy is NOT a basic skill, but is about building on students' current language expertise enabling them to draw on their cultural and linguistic resources and use them as tools for learning, goes a long way to making teaching and learning more culturally democratic.

Finally, the researchers have shown how important relationality and contextualization were in the way they approached the research process as well as the organization of the book. The use of collaborative research relationships; the openness in their approaches to research; the valuing of inclusivity and interdisciplinarity, and most importantly for me, the recognition and valuing of indigenous knowledge as an important marker of culture and contexts in research in general—all these make this book an indispensable source of wisdom for anyone wishing to participate in Education and its many facets, in Oceania, whether as learners, teachers, administrators, consultants, or researchers.

Malo ʻaupito

Glossary

Ako   learn, education, school

Akoako ngaue   practice

'Eiki toputapu   sacred and highest ranking ruler

Faiako   teacher

Faka'apa'apa   respect

Fakafanongo   listen

Fakatātā   demonstrate

Fakatonutonu   monitored, corrected

Fatu   strands use to begin the weave

Fe'unu   strips or strands of pandanus used for weaving

Feveitokai'aki   reciprocity

Fonua   land, people

Fono   community gathering, meeting

Hala fakama'ufatu   the run that binds or makes the mat stronger

'Ilo   knowledge

Kastom   culture and tradition

Kaungā ala   practise together

Lalanga   mat-weaving

Lao   Law

Lea faka-Tonga   Tongan language

Lototo   humility

Mafana   the overt response of audience/participants when a performance/activity achieves malie, thus generating transformational change

Malie   the term used to express heartfelt appreciation when a task is performed beyond expectation

Mamahi'i me'a   loyalty

Motutapu   sacred island

Noubu & Noubebla   original tribes that populated Temotu Nendo

Natgu, Nalrgo, Aiwoo and Taumako-Vaeakau   indigenous languages spoken in Nendo

Ngaue'I   perform

NguzuNguzu   a traditional figurehead in Solomon Islands historically fixed to the prow of a canoe, and the name used for primary curriculum materials (story books and teachers guides) developed in 1995 and still used today

Pālangi   Europeans, white people

Pijin   an English-based creolized pidgin

Poto   skilled

Pule'anga   government

Siofi   observation

Tālanga Laukonga   talking about literacy

Talanoa   conversation, chat, talk

Talanoa malie   conversation that makes sense and interesting

Tauhi vā   nurturing of relationships

Tauhi vaha'a   protecting the relationships

Tok stori   a relational mode of communication, widely practised in a variety of Melanesian contexts

Tu'I   monarch, king

Tu'a   commoners

'Ulungaanga faka-Tonga   Tongan culture

Vā   the socio-spatial connection between persons, relational concept which articulates the connectedness between people and between people and their environment

Wantok   one talk, a word developed to express connection in contexts where laborers from various Melanesian language groups worked together on plantations; also implies need for co-operation, allegiance and reciprocal relationships with those who speak the same language

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