

## Agenda item 8

### **EQUITY MATTERS**

#### **Draft Report of the survey commissioned by EI Research Institute to University of Exeter**

*Presentation by the lead researcher Dr. Elizabeth Wood*

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#### **SUMMARY (Full draft report attached electronically)**

##### **Introduction and research design**

The aim of this project is to capture the nature and significance of unions' equity policies in the achievement of quality education for all in public education systems. The research was undertaken in 2010 by Dr Elizabeth Wood, Professor of Education, Dr Keith Postlethwaite, Associate Professor of Education, Dr Martin Levinson, Senior Lecturer, and Alison Black, Research Assistant.

##### Aims:

1. How do education unions conceptualize equity in education?
2. How are these concepts operationalised, as evidenced in unions' policies and practices?
3. What are the issues for teachers, with regards to the concepts of equity?
4. How can Education International contribute to the international debate on equity in ways that benefit members?

##### Research design:

1. Literature review to identify key concepts, trends and issues in research, including empirical and theoretical studies, and reports from international organizations (such as UNESCO, OECD).
2. Country-wide Lime Survey questionnaire (on-line and Word versions), resulting in quantitative and qualitative data.
3. Six country-specific case studies, using general and country-specific questions, derived from the survey.
4. Analysis and synthesis - key trends and developments, and future challenges for EI, and implications and recommendations for teachers' trade unions (policies and practice).

##### **Issues from the review of international literature:**

We have used the concepts of horizontal and vertical equity Brown (2006) to understand how equity policies are defined and operationalised at country-level, and in international policy aspirations.

- Horizontal: equal treatment of those who are equal. This is a starting point and precondition that can be used to achieve equity. It is a means, not just an end.
- Vertical: unequal but equitable treatment of those who are not equal, which is designed to reduce inequality.

We have also used Milner's (2010) theory that the perceived achievement gap (across different groups of children) is an outcome of a matrix of gaps, which involves equity issues for teachers

and children. These 'gaps' intersect to improve or reduce children's educational achievements and life chances.

### **Analysis and findings**

All EI affiliated unions were sent the survey (English, French and Spanish translations), with 31 responses. From these, 6 case studies were carried out in Canada, New Zealand, Ireland, England, Poland and Zambia.

#### **Unions' concepts, goals and policies on equity**

Not all sections of the survey were completed fully by all the respondents, which resulted in incomplete or missing data. The data are therefore limited in reliability and generalisability, but nonetheless do have indicative and illuminative value.

Five unions had no specific equity policy formulated; of the others some had wide ranging policies that included broad principles of horizontal equity. Some had more detailed policy statements that focussed on specific areas related both to teachers and to children, and addressed vertical equity.

The goals in union policies for *teachers* included equity in relation to career opportunities, conditions of service and pay; for *children* they included equity in relation to access to education, to opportunities to achieve and to access to resources. Equity was sought across categories defined in a variety of terms including gender, sexual orientation, sexuality, LGBT persons, race, religion, ethnicity, marital status, colour, creed, ethical or religious beliefs, ability or disability, age, political opinion, employment status, family status, social class/income/rich and poor, second language learners. However, not all unions paid attention to all these categories in their policies. The goals most often omitted from union policies were 'equity for students with physical disabilities' and 'equity for students with learning disabilities'. In addition, some unions align equity goals with international policy goals such as the UN Convention for People with Disabilities, Education for All. However, there are some tensions between goals that focus on horizontal and vertical equity.

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The unions' views were that similar goals were reflected in government policy. However, these government policies were often seen as "not implemented as yet" (e.g. more than 50% of respondents felt that their governments had not yet implemented their policy for equity in resource distribution or their policy for equity by social class). As is to be expected, unions engaged with governments about these issues, and some interesting mechanisms for engagement were outlined. Unions often stated that although progress was being made, that progress was slow.

Unions often saw equity issues as more complex and more targeted than is implied by discussion of general categories such as 'boys' and 'girls'. For example, it was specific groups of boys and girls (rather than boys or girls generally) who suffered the most marked inequities in terms of their school achievements, and the longer-term impacts of relatively lower outcomes.

Several unions were critical of the notion that they should list their top three priorities across this range of equity concerns because they did not feel it appropriate to prioritise some aspects of equity over others; other unions felt that priorities changed in light of contextual circumstances such as a change of government, or the global economic downturn.

As might be expected, when discussing equity goals, unions in different countries identified different issues related to their broader cultural and economic circumstances, and educational histories. (For example, in a period of economic uncertainty in Ireland, much concern was expressed over such matters as equity in job security). However a key issue was that, in order to achieve equity, boys and girls, and other minority/disadvantaged groups within countries' populations, may need to be treated differently through the provision of specific programmes or interventions, specialist teachers or dedicated funding, which indicates support for vertical equity goals.

Although some unions saw no barriers to the achievement of equity, others identified a range of barriers such as funding, resource allocation, teacher supply and training, a euro-centric curriculum, and broader cultural issues. As well as the *amounts* of financial and other resource available, there were concerns about the misuse, mismanagement or misdirection of resources. Unions noted that the people particularly affected by these barriers were often children with special educational needs, the socio-economically deprived and cultural minorities.

### **Country-specific factors regarding equity**

The case studies of six countries all indicated that although unions' goals and policies are focused mainly on equity in education, their policy remit extends to influencing related areas of social policy such as health, welfare and housing. This is because some policy goals for equity in education need many solutions, which reflects Milner's (2010) argument that equity goals for children need to be addressed across a matrix of gaps.

Diversity is an umbrella term – there are diversities within diverse minority groups (such as Indigenous communities, Gypsy Roma Traveller communities, and within special educational needs and disabilities).

More attention needs to be paid to these diversities with regard to language, cultural practices and beliefs, and home and community child-rearing practices. Teachers need more culturally-situated knowledge to better respond to equity issues.

Special projects and interventions need to be sustainable in terms of funding and impact. Otherwise equity policies are more fragmentary than holistic.

### **Implications for Education International's goals and policies**

International drivers for improving access and quality have limited impact without attention to equity for teachers and for children.

Areas of inequity are common across countries (gender, income and SES, ethnicity, indigeneity, special educational needs and disability, etc). Inequalities and social injustices are intensified across these intersections (e.g. being poor, female, and in a rural location). One aspect of inequity (e.g. SES) needs many solutions – the equity gap is an outcome of a matrix of other gaps, which need policy solutions from different government departments such as health, welfare, and housing.

Whilst horizontal equity exists as an intrinsic value in unions' goals and policies, vertical equity is needed to address cycles of disadvantage. This is especially true for the *most* disadvantaged groups in society (minority groups, marginalised groups, Indigenous groups).

Horizontal equity cannot be achieved as an end in itself because of shifting national and global contexts. Rather it is a means to equity goals.

More resources, but better targeted resources are needed to achieve vertical equity. However, this is an increasingly challenging aspiration in the current economic conditions and educational trends towards privatisation and/or public/private partnerships. There is a danger of fragmentary rather than holistic approaches being reinforced.

Strong equity policies do influence the overall quality of educational provision and outcomes through structural and process variables, including access and accessibility; opportunities via curriculum, pedagogical differentiation; materials and resources; high quality teacher education; outcomes for children. In countries where these conditions are provided then horizontal and vertical equity are more likely to be achieved, and are more likely to lead to positive cycles of advantage.

An alignment of horizontal and vertical equity goals and resourcing influences the quality of education. However, equity and quality may be 'traded-off' under certain circumstances. Unions' goals and policies cannot always be implemented because of mediating factors such as funding, competing priorities, national and international policy drivers.

### **Ongoing challenges**

Current global trends are creating potential threats to equity and quality via the 'economic downturn'. These include reduced resources, privatisation, rolling back unions' achievements in existing progress in conditions of service, and in the quality of provision for specific groups of children.

How will unions respond to these global trends? The evidence suggests that some unions are defending existing policies on pay and teachers' conditions of service, rather than focusing on gaining further improvements.

How can unions (with the support of Education International) balance trading-up and trading-off equity goals? Several unions would like to make better use of international comparative data.

The evidence indicates that the most disadvantaged and most marginalised groups are also the most vulnerable to cuts in funding. How can unions influence equity and access these groups?