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Protecting Teachers or Protecting Children? Media Representations of *Vergara v. California*

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Abstract

Over the past five years, the laws governing teachers' employment have been at the center of legal and political conflicts in state courts and elections across the United States. *Vergara v. California* challenged five California state statutes that provide employment protections for teachers. Drawing on the theory of political spectacle, we conducted a media content analysis of 42 print news media articles published prior to the court's decision in June 2014. Two aspects of political spectacle, the use of metaphor and the illusion of rationality were the most salient and deployed in ways that were more closely aligned with the student plaintiffs' claims than the statutes' defenders. We conclude by highlighting how the framing of these and other similar stories may shape subsequent debates about public education in the United States.

Keywords: education policy, teachers, tenure, Vergara v. California, media content analysis, newspapers, print news media, political spectacle

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¿Protegiendo Docentes o Protegiendo Niños? Representaciones de los Medios sobre el Caso *Vergara v. California*

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Resumen

En los últimos cinco años, las leyes que rigen el empleo de docentes han estado en el centro de los conflictos jurídicos y políticos en los tribunales estatales y las elecciones en los Estados Unidos. El caso *Vergara v. California* desafió cinco leyes del estado de California que proporcionan protección laboral a los docentes. Basándonos en la teoría del espectáculo político, analizamos el contenido de 42 artículos publicadas en la prensa antes de la decisión de la corte en junio de 2014. Dos aspectos de la teoría de espectáculo político, el uso de metáforas y la ilusión de la racionalidad fueron los más destacados y usados de manera estrechamente alineadas con las demandas sobre los estatutos de los estudiantes en detrimento de las demandas de la defensa. Concluimos, poniendo de relieve la forma en que este tipo de encuadramiento sobre esta y otras historias similares puede afectar futuros debates sobre la educación pública en los Estados Unidos.

Palabras clave: políticas educativas, docentes, medios de communicación, espectáculo politíco

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The November 3, 2014 cover of *TIME Magazine* featured a dramatic photograph of a gavel in mid-strike over an apple with the headline “Rotten apples: It’s nearly impossible to fire a bad teacher” in stark black-and-white lettering. This story was perhaps the most controversial of the national news media coverage in the United States (U.S.) generated by *Vergara v. California,* a lawsuit that challenged five state statutes that provide employment protections for teachers working in California public schools. The first statute grants teachers permanent employment in a school district after two years of employment.[1] Three of the statutes outline due process procedures for dismissing teachers. The final statute at issue in the lawsuit requires teacher layoffs to be determined via seniority.[2] On June 10, 2014, Judge Rolf Treu of the Los Angeles County Superior Court declared that these statutes were unconstitutional. In this paper, we assess the extent to which *TIME*’s framing of the lawsuit was consistent with print news media coverage prior to the court’s decision. Drawing on the theory of political spectacle (Smith, 2004), we used media discourse analysis (Altheide & Schneider, 2013) to analyze the 42 print news media articles published between May 2012 and April 2014.[3]

Background

One of the hallmarks of the U.S. educational system is that it is highly decentralized. Authority for education is delegated to states as a “reserved” power under the Tenth Amendment to the U.S. Constitution (Corcoran & Goetz, 2005, p. 31). As a result, the laws governing teacher employment in the United States are encoded in individual state statutes and vary considerably from state to state. As a result, legal challenges to teachers’ employment provisions have to be brought in their respective state courts. In November 2010, Silicone Valley entrepreneur David Welch founded Students Matter, a non-profit organization with the goal of “promot[ing] access to quality public education through impact litigation, communications, and advocacy” (Students Matter, n.d., para. 1). The *Vergara* lawsuit, filed in a California state court, was its first legal challenge. A second lawsuit, *Doe v. Antioch*, was filed in June 2015 in an effort to compel thirteen California school districts to comply with the Stull Act, which requires districts to use standardized test data to evaluate teachers (Fensterwald, 2015). Students Matter's initial cases, including *Vergara*, targeted laws related to teacher employment and evaluation that its team viewed as barriers to students' educational opportunities. Student Matters also aims to litigate these and other policies "in the court of public opinion where students' rights and voices matter most" (Students Matter, n.d., para. 1).

Welch's organization spent the year and a half after its founding developing the legal strategy for *Vergara* and recruiting plaintiffs (Edwards, 2014).[4] In May 2012, Students Matter's legal team filed the lawsuit on behalf of nine students. While the plaintiffs' complaint noted that the statutes burdened all students who might be assigned a "grossly ineffective teacher," the plaintiffs' key claim is that the employment protection statutes specifically burdened poor and minority students whose "schools have a disproportionate share of grossly ineffective teachers" (First Amended Complaint, 2012, p. 1). As a result, the teacher employment statutes "perpetuate and widen the very achievement gap that education is supposed to eliminate" (First Amended Complaint, 2012, p. 1). In January 2014, the case went to trial, and six months later, Judge Treu declared that the five statutes governing teachers' employment were unconstitutional. In April 2016, the California Court of Appeals reversed Judge Treu's decision, and one month later, the plaintiffs appealed the decision to the state Supreme Court (Medina & Rich, 2016; Szymanski, 2016). In August, after three months of deliberation, the California Supreme Court denied the plaintiffs' request (Aron, 2016). In September 2016, the Contra Costa County Superior Court rejected Students Matter's claims in *Doe v. Antioch*.

Vergara can be understood as part of a recent wave of well-funded efforts to roll back the due process and collective bargaining rights of teachers and other public employees (Allegretto, Jacobs & Lucia, 2011; Aronowitz, 2011; Medina & Rich, 2016). Similar cases, *Davids v. New York*, and *Forslund v. Minnesota* have been filed in New York and Minnesota courts, respectively. Campbell Brown, the former CNN news anchor, was a high profile proponent of a second New York lawsuit that was consolidated with *Davids, Wright v. New York*. These lawsuits are spearheaded by the Partnership for Educational Justice, which is funded by the Walton and Broad Foundations (Medina & Rich, 2016). As we highlight below, because the news media is an important source of information for the general public about significant public policy questions, it is important to document and analyze how *Vergara* and similar cases are presented in the news media. More specifically, the laws governing tenure and due process rights for teachers, the core issue in *Vergara*, affect over 295,000 teachers who teach more than six million students enrolled in California's public schools.[5] Students Matter continues to pursue legislative strategies in California aimed at changing the employment provisions at the center of the lawsuit. More recently, Students Matter filed a lawsuit in a Connecticut federal court arguing that the state's laws and policies reduce students' access to public school choice via limiting the creation and expansion of charter and magnet schools.

Literature Review and Conceptual Framework

As a matter of public policy, education reform has been and continues to be an important topic covered in news media. The news media is a key source of information for the general public about important public policy questions. For example, Barabas and Jerit (2009) found that different indicators of the level of newspaper coverage of a policy issue (e.g., volume, breadth, and prominence) are more strongly associated with people's policy-specific knowledge than demographic factors. Despite the apparent ubiquity of news stories on social media, a substantial share of the news consumption of the adult U.S. population is from local media sources (Gentzkow & Shapiro, 2011). Beyond simply providing information to the public about policy questions, the news media also plays an important role in shaping the extent to which a phenomenon is understood as a public problem and how members of the public view the policy interventions that are proposed as solutions (Gabriel & Lester, 2013; Haas & Fischman, 2010; McCombs, 2004; Moses & Saenz, 2008, Saenz & Moses, 2010; Shoemaker & Reese, 2013). Many newspaper reporters and intermediary actors quoted in news media articles—think tank spokespeople, philanthropists, education celebrities, and research firm representatives often frame their assessments of education reform around the stories of helpless public school children (Goldie, Linick, Jabbar, & Lubienski, 2014). A central theme of many of these stories is the ineffective teacher, who is often portrayed as the villain hindering efforts at education reform (Gabriel & Lester, 2013). Thus media stories about education are not neutral and objective but reflect relationships of power and privilege in the broader society. The media provides cues to the public about how to interpret and understand the people and policies associated with education reform (Cohen, 2010; Goldstein, 2011).

The conceptual framework for our analysis is drawn from Smith's (2004) adaptation of Edelman's (1988) political spectacle theory. Smith argued that contemporary political dynamics have caused public policies, and in particular education policies, to become less democratic and distorted by a degenerative politics that is driven by ideological contests rather than substantive efforts to improve public schools. In this view, policymaking is a theatrical act where the primary locus of activity is the political spectacle; actors are involved in what amount to largely symbolic activities that are aimed at winning conflicts over ideas and values. That is, their efforts are largely focused on promoting their own visions of the problems of education and the solutions they propose in response. Drawing on Smith, we have identified five key elements of political spectacle: a) the use of metaphorical language; b) the casting of political actors in character roles (e.g., heroes, villains, and victims); c) dramaturgy or the staging of events; d) efforts to create the illusion of rationality via the use of numerical data, opinion polls, and research to justify policy claims or decisions; and e) a disconnection between means and ends, or indicators that there is a mismatch between a goal of a policy proposal and the possible outcomes.

Metaphors encourage the public to link specific ideas and concepts in ways that "appeal to intuition, emotion, and tacit assumptions rather than to reason" (Smith, 2004, p. 20). For example, in Arizona, politicians interested in promoting a high school graduation test described the existing graduation policy without the test as "seat-time" to suggest that students simply had to pass time in high school to graduate rather than fulfill what they framed as the more rigorous requirement of taking a test (Smith, 2004, p. 15). Metaphors also create cognitive boundaries for understanding because other information or interpretations that are not aligned with a specific frame are likely to be viewed as irrelevant, thus reinforcing the tacit assumptions that most people use to make sense of policy proposals. Metaphors are closely related to prototypes (Haas & Fischman, 2010; Haas, Fischman & Brewer, 2014). To understand complex, multi-characteristic concepts, individuals create idealistic or generalized prototypes or mental models that function as a point of departure for understanding and reasoning about them (Haas & Fischman, 2010).[6] Metaphors and prototypes are powerful because:

> They can have a profound effect on how we understand a concept at issue and whether related policies make sense or not. Given the mostly unconscious nature of these understandings, propositions that appear to favor the most prevalent prototype will have political advantage – their policies and programs will have an initial gut-level rationality and importance that others will not. (Haas & Fischman, 2010, p. 535)

Both casting and dramaturgy involve the use of vivid description. In the former, the descriptions are used to associate different actors in an event with the roles of heroes, victims, and villains. In the latter, descriptions evoke a dramatic setting or event. The illusion of rationality is fostered by the marshaling of what appear to be hard facts to support claims. Stone (2002) highlighted a range of phenomena that appear neutral on the surface, but are the outcome of highly value-laden political and social processes. These include things that are measured or counted in public policy debates (e.g., employment rates, the homeless population, and the number of beds available in health care facilities) and scientific research.

In our analysis, we identified three types of facts associated with the illusion of rationality: a) the use of numerical data related to teachers' employment (e.g., salaries, or the number of teachers that had been released from their contracts for unsatisfactory performance); b) descriptions of findings from scholarly research; and c) the use of data from opinion polls to support a claim. Stone (2002) observed that while on the surface numbers are "not ambiguous," the process of arriving at a specific figure entails categorization and counting, which involve decision rules that are masked (p. 165). Likewise, while the common sense view of research is that it is authoritative, researchers understand that research findings are often debated within the research community and are cumulative rather than definitive. Finally, the disconnection between means and ends was used to track claims that a proposed policy solution would not address the underlying problem identified by its proponents. For example, *Vergara's* proponents argued that eliminating teachers' employment protections would increase poor and minority students' access to high quality teachers, a claim that has been questioned by some observers (Schrag, 2014).

Methods and Data Sources

We used print news media articles as our main source of data for this analysis because we were interested in understanding how the *Vergara v. California* case was being portrayed to the public. *Vergara* was widely viewed as a test case for similar lawsuits in other states (Medina & Rich, 2016; Sawchuk, 2014). Because print news media is a key source of information for the general public about crucial policy questions (Barabas & Jerit, 2009; Jerit, Barabas & Bolson, 2006; Moses & Saenz, 2008), it is important to understand how the media framed the case in its first phase. While judges rather than juries decided the outcomes of the case, it is likely that this initial framing set the tone for the print media coverage in the subsequent phases of the case and will shape the coverage of any future legislation related to the statutes at the center of the case. Moreover, local legal cases do not tend to receive much coverage in national newspapers, so it is striking that there were a substantial number of national stories on *Vergara* published prior to Judge Treu's decision (Barabas & Jerit, 2009).

We constructed our dataset by searching LexisNexis and ProQuest for articles published between May 2012 and May 2014 using the search terms "David Welch," "Students Matter," "teacher tenure," and "Vergara." Our searches yielded 42 news, editorial, and opinion print media articles published in national core and California newspapers.[7] We included articles published in the *Los Angeles Times* in our counts of California newspapers. While the *Los Angeles Times* is considered a core national newspaper by ProQuest, because the Los Angeles Unified School District was one of the defendant school districts, the *Vergara* case was an event in the *Times'* local media market that would merit coverage.

In the first stage of the analysis, we categorized the articles by a set of objective characteristics: a) year published; b) article type (news article, editorial, opinion piece); and c) news source (California, national, or international newspaper, and other). For the second stage of the analysis we developed a set of substantive codes that addressed the elements of political spectacle as described by Smith (2004). We refined this list of codes and expanded it to include a set of inductive codes drawn from our initial reading of five articles that represented the range of the dataset by date and type (see Table 1 below). We read the articles and coded them independently, and then compared our initial codes to ensure that we were defining and applying our codes consistently. While we coded all of the articles in the dataset using Dedoose (2014), we coded the news and editorial articles first because these are ostensibly the more neutral and objective accounts of the case (Cook, 1998) before analyzing the opinion pieces, which we viewed as more explicitly partisan.

Findings

Objective Analysis

Table 1 outlines the objective characteristics of the articles. The majority of the print news media articles (31 or 74%) were published in California-based newspapers, while a quarter were published in national core newspapers. Although eleven print media articles were published in 2012, most were published in 2014 and many of those articles covered the hearing, which took place from January to March of 2014. A number of newspapers, including *Education Week* (a national newspaper aimed at a U.S. readership interested in education) and the *Los Angeles Times* (a national newspaper written for a general audience fluent in English) summarized the testimony in some detail, which is not surprising because one of the key witnesses was John Deasy, the superintendent of the Los Angeles Public Schools, the second largest school district in the U.S. and the local media market for the *Los Angeles Times*. More than half of the articles published in California newspapers were opinion pieces, which suggests that there was a substantial effort to shape public opinion about the case in local news markets.

Table 1. *Objective Characteristics of Print News Media Articles*

	California newspapers, N=31	National newspapers, N= 8	International newspapers, N= 1	Other sources, N= 2
Article type				
News	12 (38.7%)	7 (87.5%)	0 (0.0%)	0 (0.0%)
Editorial	4 (12.9%)	0 (0.0%)	0 (0.0%)	1 (50.0%)
Opinion	15 (48.4%)	1 (12.5%)	1 (100.0%)	1 (50.0%)
Year published				
2012	9 (29.0%)	2 (25.0%)	0 (0.0%)	0 (0.0%)
2013	3 (9.7%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
2014	19 (61.3%)	6 (75.0%)	1 (100.0%)	2 (100.0%)

Proponents of the *Vergara v. California* court case wrote eleven of the 18 opinion pieces, five were written by opponents, and two were neutral. Prominent authors wrote five of the proponent opinion pieces: David Welch (two), Theodore Boutrous, Jeb Bush, and Michelle Rhee. Theodore Boutros was lead co-counsel of the *Vergara* legal team and had recently gained notoriety for successfully representing the plaintiffs in the 2013 Supreme Court case challenging Proposition 8, California's ban on gay marriage. When *Vergara* was being decided in 2014, Jeb Bush was the former governor of Florida, the brother and son of two former Presidents, and the founder of the Foundation for Educational Excellence, an organization aimed at promoting education reform by expanding accountability and school choice policies.[8] Michelle Rhee is the former (and high-profile) chancellor of the Washington D.C. public schools and founder of StudentsFirst, an educational advocacy organization.

In contrast, the authors of the opinion pieces opposing the case were less well-known: Joshua Pechthalt, vice president of the California Federation of Teachers; Ann Katzburg, president of the San Ramon Valley Education Association; Geoff Johnson, a retired superintendent of schools in British Colombia; Mark Takano, a U.S. Congressman from California; and Walt Gardner, a former classroom teacher and lecturer. Research in advertising has indicated that high profile or celebrity writers or product endorsers have more perceived credibility with the general voting public than people with less name-recognition (Agrawal & Kamakura, 1995; Mittelstaedt, Riesz, & Burns, 2000). This suggests that an article written by Michelle Rhee or Jeb

Bush may have more influence on public opinion than an article written by a local schoolteacher or a teachers union president.

Thematic Analysis

Our initial thematic analysis focused on the 20 news articles as the more neutral and objective accounts of the case. Our analysis yielded considerable evidence that *Vergara* might be better understood as a political spectacle rather than a substantive effort to change education policy. Indeed, the Student Matters website explicitly states that one of the organization's goals is to change public perceptions of teacher employment laws and policies. Although Judge Treu's 2014 ruling was overturned in the appeals court in April 2016, as we suggest below, Students Matter has made some headway on this secondary goal.

"Bad teacher": First, we examined the way that the term "teacher" was qualified in the news articles. In the vast majority of instances when the word teacher was used, it was paired with a negative term. These included: "ineffective teacher," "bad teacher," "insufficient teacher," and "lazy teacher." In comparison, more positive terms such as "effective teacher," "good teacher," and "motivated teacher," were less prevalent. In a few instances teachers were referred to in neutral terms such as "average," "probationary," "tenured," and "more and less effective." The phrase "ineffective teacher" was used the most frequently throughout the articles. While the terms "effective" or "ineffective teacher," are ambiguous, they are also associated with value added models for measuring teachers' performance, which are a popular policy proposal (see, for example, The Measures of Effective Teaching Project (MET) (2015)), and a core component of the plaintiffs' legal argument. One of the plaintiffs' central claims is that teachers' continued employment should be based on their "effectiveness" as measured by value added models rather than seniority. While the American Statistical Association (2014) released a statement in April 2014 that raised significant concerns about the use of value-added models for high-stakes purposes, these have been largely ignored in the policy debates about the use of value-added models for teacher evaluation, and were not explained in any depth in the initial phase of the print news media coverage of the *Vergara* case. We return to this point in our

discussion of political spectacle below.

The consistent pairing of negative qualifiers with the word "teacher" in print news media stories about the case could have implications for how the public understands teachers and their work by activating people's unconscious perceptual schema related to moral values (Lakoff, 2008). Bad teachers need to be removed from classrooms while their students deserve our empathy. Rules that enable "bad" teachers to continue teaching students are cast as illegitimate, while the methods used to determine who is a "bad" or "ineffective" teacher are not deeply scrutinized.

Political spectacle: Our analysis indicated that many elements of political spectacle were present in the articles, however, two aspects of political spectacle were the most salient: a) the use of metaphor; and b) the illusion of rationality. While we did not identify a single metaphor that was used exclusively or predominated, the teachers' employment protections that were at the center of the case were consistently described as a problem for schools and school administrators. This theme is reflected in Theodore Boutrous' claim that the laws are "handcuffing school administrators" (Jones, 2012). The statutes were characterized as requiring procedures for dismissing teachers that were cumbersome, time-consuming, and expensive. The latter points were highlighted in multiple articles that reported the testimony of John Deasy. While the Los Angeles Unified School District was originally a defendant school district until it reached a settlement with the plaintiffs, Deasy was repeatedly described as supporting the plaintiffs' claims. An excerpt from a story in the *San Jose Daily News* that recounted Deasy's testimony illustrates this theme. Note also how in this short excerpt, the term "grossly ineffective teacher" was used three times.

> The plaintiffs called as their first witness Los Angeles Unified School District Superintendent John Deasy, who testified about the difficulty of weeding out "grossly ineffective teachers" in the 18-month probationary period before they are granted tenure. Deasy was asked whether because of the short time for evaluation, the nation's second-largest school district has been unable to avoid granting tenure to some grossly ineffective teachers. "That is my opinion," he said. Under questioning by plaintiff's attorney Marcellus McRae, Deasy said the district has been in the position of dismissing tenured teachers when they turned out to be grossly ineffective. He said it was a long

> and expensive process. "An average successful termination is one to two years," he said. "But some cases have taken slightly less than 10 years." Deasy said the cost to the school district for each dismissal ranges from $250,000 to $450,000. If misconduct is involved, it can cost even more, he said, because "you're preparing a court case." Deasy said the dismissals have been so arduous that "on more than one occasion a principal has said they'd think twice before going through this process again." (Deutsch, 2014)

The defense team was comprised of lawyers for California state education officials and teachers unions defending the statutes, who argued that the employment statutes did not prevent school districts from terminating the employment of ineffective teachers before or after being awarded tenure. Rather, ineffective teachers remained in classrooms because of how schools and school districts were managed. If schools were better managed, the existing procedures for due process would be followed, and ineffective teachers would be dismissed. However, this counter-argument was not only less prevalent in the articles, but also less sharply drawn. An excerpt from a story published in the *Los Angeles Times* illustrates this counterargument:

> Deputy Atty. Gen. Nimrod Elias countered that the laws themselves do not pair students with ineffective teachers. It is districts and administrators who have the opportunity and sole discretion to remove ineffective teachers from classrooms and decide whether to grant tenure. The laws are crucial safeguards, he said. "It does not take 18 months to identify those incompetent teachers," he said. (Ceasar, 2014b)

A second theme was often paired with the metaphor of teachers' employment protections as a problem and that we believe also functioned as a metaphor. The statutes were also framed as an undeserved benefit that exceeded the fringe benefits provided to other workers as part of their compensation packages. Many of the descriptions of the employment protections as an undeserved benefit were explicitly identified as arguments made on behalf of the plaintiffs, but this characterization was also evident in more general descriptions of the case. For example, a *Los Angeles Times* article covering the hearings contained the following description in the opening paragraph:

> Local school districts, state legislators and even a California governor have tried to limit teachers' job protections, *among the most generous in the country*. Efforts have all failed to rid public schools of ineffective teachers by making it easier to fire them and tougher for them to gain tenure and by stripping them of seniority rights. Now proponents are taking their fight to another venue: the courtroom. (Ceasar, 2014a, italics added)

This description from the *New York Times*, while ostensibly balanced because it presented the claims of both parties, also seemed to privilege the plaintiffs' assertions:

> In many ways, the case echoes the political debate over tenure that has gone on for years. Some school superintendents and education advocates have pushed to loosen laws granting teachers permanent employment status, which they argue are *anachronistic and harmful*. Unions and their allies, however, say such laws are necessary to protect teachers. (Medina, 2014, italics added)

Both quotations suggest that teachers' receive unearned benefits as a result of out of control and highly politicized processes. In the second quotation, the opponents of the statutes are framed in positive and neutral terms as "education advocates" when the deep-pocketed policy entrepreneurs such as Welch that are bankrolling this effort are powerful political actors.

A second key aspect of political spectacle that was evident in the print news media stories was the illusion of rationality or the marshaling of what appear to be hard facts to support claims, the majority of which were numbers and descriptions of findings from scholarly research. One figure that was repeated across four stories was drawn from Deasy's testimony, which was quoted three times (see excerpt from the *San Jose Daily News* above for an example) and summarized once. Deasy argued that building a case to dismiss a teacher cost the LAUSD between $250,000 and $450,000. This statistic was also reported in a story that appeared in the *Christian Science Monitor*, which included a figure for the number of teachers that had been dismissed in California in the last decade.

> The combined effect of the five laws costs school districts hundreds of thousands of dollars through years of legal procedures to remove teachers who are hindering academic development, said plaintiff lawyer Mr. McRae. Asked how much it costs the LAUSD to dismiss a grossly ineffective teacher, Superintendent Deasy testified, as seen on Courtroom View Network (CVN), "between $250,000 and $450,000." Asked if that is a deterrent in dismissing teachers, he said, "It is my opinion that it is." Because the termination process requires years of documentation, it not only is costly but it also seldom works – 91 teachers have been dismissed over 10 years in the entire state. Of those dismissals, 19 were based on unsatisfactory performance, while the vast majority were for egregious conduct. (Wood, 2014)

Two additional stories cited a cost of $350,000 to dismiss a teacher, the midpoint of this large range. The journalists did not question these figures nor did they provide information that would allow readers to critically assess Deasy's claim.

While less frequent, the findings from scholarly research were also invoked by both the plaintiffs and the defendants to support their claims; five of the 20 news articles addressed research findings to some degree. One article that discussed the role of research in the hearing extensively was a February 2014 *Education Week* article, which provided profiles of the researchers for both sides. While overall the article was balanced, the only researcher whose testimony was described in the story was an expert witness for the plaintiffs:

> The very definition of a "grossly ineffective" teacher is being contested. The plaintiffs are basing their case in part on research showing that students' achievement varies greatly depending on the teachers to whom they're assigned. Those studies hinge on a statistical method known as "value added," which aims to isolate the effect of each teacher on his or her students' standardized-test scores. But that method has proved controversial as states and districts, prodded by federal incentives, adopted it in systems for evaluating individual teachers. … Nimrod Elias, a California deputy attorney general, said in his opening statement that value-added measures were

> "methodologically flawed" and "limited in what they purport to show." Both the plaintiffs and defendants in the Vergara trial have lined up competing expert witnesses to testify on whether the measures are valid—a fact that highlights the deep ideological divides on teacher quality even among scholarly researchers. Raj Chetty, a Harvard University economics professor, took the stand late in the week to testify that students taught by teachers with low value-added scores were at risk of "substantial harm." (Sawchuk, 2014)

This quotation also highlights a key dilemma for the defendants. When value-added models were discussed, the debates about the efficacy of value-added models for measuring teachers' performance were often noted. More relevant for the issues raised in *Vergara* is that many scholars have identified significant methodological and practical issues that make the use of value-added models for high-stakes decisions about teachers' employment problematic (Amrein-Beardsley, 2008; Baker, Oluwole, & Green, 2013; Darling-Hammond, Amrein-Beardsley, Haertel, & Rothstein, 2012; Pivovarova, Amrein-Beardsley, & Broatch, 2016).

However, this more complicated and nuanced argument is not explained in any depth, while the plaintiffs' experts' concise and compelling statistics from their own research were reported. For example, *The New York Times* highlighted the following finding: "Students who are taught by such teachers lose up to $1.4 million in lifetime earnings compared with those who are taught by average teachers, according to a study by Raj Chetty, an economics professor at Harvard who testified on behalf of the plaintiffs" (Medina, 2014). This figure refers to the estimated gain that would occur from replacing the teachers with the lowest value-added scores with an average teacher (Chetty, Friedman & Rockoff, 2014). While this figure seems straightforward and impressive, it amounts to a lifetime earnings gain of $50,000 per student for the average class size in their sample (28 students) or $1,250 per year over 40 years.[9] Moreover, this estimate does not account for the monetary and non-monetary costs of implementing this policy at scale. As Stone (2002) highlighted, while numbers are "symbols of precision, accuracy, and objectivity," they mask the assumptions and choices involved in measuring social phenomena and interpreting the findings (p.176; see also Adler, 2013).

Discussion and Conclusion

Our preliminary analysis of the media coverage of *Vergara v. California* suggests that the case is best understood as a political spectacle. While more dramatic and stark than the majority of the print news media articles we analyzed, *TIME's* framing of *Vergara* was consistent with coverage prior to the court's decision. Rather than a substantive policy aimed at improving educational conditions and opportunities for poor and minority students, the more significant outcome from the case is likely to be its influence on how the public understands teachers' employment protections and the teaching profession more generally. During the early stages of the case most of the print news media articles were from California newspapers. Once the hearings were underway, national newspapers covered the case in some depth. Over half of the print news articles were opinion pieces, and the majority were written by proponents of the lawsuit, many of whom were high-profile public figures. This highlights how *Vergara's* proponents were engaged in a sophisticated and sustained effort to shape public opinion about the case (McCombs, 2004).

While we found evidence of most of the elements of political spectacle in the print news media stories published prior to the decision, the use of metaphors was the most pronounced. Two key metaphors framed teacher employment protections as barriers to progress for schools and school administrators and as undeserved benefits. The plaintiffs' legal team consistently characterized the state statutes as cumbersome, time-consuming, and expensive, and argued that students are harmed when teachers are awarded tenure at an early stage in their careers. While the legal team for the defendants countered with the argument that the problem was management, or how the statutes are being implemented by school and school district administrators, this argument was less consistently represented in the print news media and also less crisply drawn. In addition, plaintiffs were regularly able to draw upon compelling statistics and summaries of research findings to support their claims, both aspects of the illusion of rationality. Moreover, the numbers cited by proponents were not rebutted. For example, the claim that effective teachers increase students' future earnings by $1.4 million is an estimate derived from a complex statistical analysis. While a detailed analysis of the assumptions and methodological choices involved in this and similar analyses are outside the scope of many news stories (see, for example, Pivovarova, Amrein-Beardsley, & Broatch, 2016), journalists should also report that these figures are estimates and averages when relevant to allow the public to critically assess them.

Finally, the term "teacher" tended to be linked with negative qualifiers. Our thematic analysis suggests that even the most ostensibly balanced news coverage of the *Vergara* case was more consistently aligned with the plaintiffs' arguments. This negative portrayal of teachers and their conditions of employment may influence the general public's views about teachers and teaching beyond this court case and in other similar cases regardless of the final outcomes. That is, because the print news media is an important influence on the general public's perceptions and understanding of policy questions, we expect that the negative perceptions of teachers and teachers' work that dominates these articles, including those that are aimed at presenting balanced accounts of the case, will persist. As Lakoff (2008) reminds us, these and similar phenomena have long term implications on policy making and politics by contributing to a broader ideological shift that has fostered mistrust in U.S. public institutions. Contesting and recasting these powerful narratives about teachers and teaching will remain a significant challenge for U.S. public school advocates in the twenty-first century.

Notes

[1] The lawsuit also claimed that these provisions exceeded those generally granted to public employees.

[2] In this context, seniority refers to the status a teacher gains for the length of time he or she has worked for a school district. The longer a teacher has worked for a school district, the higher the seniority level he or she holds.

[3] To assess how the case was portrayed in the media in its initial phase, we analyzed print news media articles one month before the *Vergara v. California* lawsuit was filed through Judge Treu's decision. Our searches did not yield any newspaper articles discussing *Vergara v. California* that were published during the month of May and in the ten days in June prior to the outcome of the case. The last article in our database was published in April 2014.

[4] Welch consulted with a prominent constitutional scholar, Kathleen Sullivan, former dean of the Stanford Law School, to develop the legal strategy used in the case (Edwards, 2014). Little information is available about how the plaintiffs were recruited, although profiles of the students are available on the Students Matter website and on blogs promoting the case. An

early newspaper article reported that Welch started the organization with $200,000 of his own funds and received donations from more than 100 supporters (Sawchuk, 2012).

[5] The figures reported here are for the 2014-15 school year and are available at http://dq.cde.ca.gov/dataquest/.

[6] Haas and Fischman's (2010) discussion of prototypes draws extensively from Lakoff's discussion of metaphors as a central characteristic of our conceptual system which "structure how we perceive, what we think, and what we do" (Lakoff & Johnson, 1980, p. 4).

[7] We did not include three articles in these counts that duplicated others in the dataset. The following newspapers are categorized by ProQuest as the national and expanded core of newspapers: *The New York Times, The Wall Street Journal, The Washington Post, USA Today*, and *The Christian Science Monitor* (www.proquest.com/products-services/nationalsnews_shtml.html). We also included *Education Week* in this group because it is a major national newspaper focusing on educational issues.

[8] While Bush was a candidate for the 2016 Republican Presidential nomination, his candidacy post-dates the media coverage analyzed here.

[9] While a more technical point, the $1.4 million in earnings refers to *undiscounted* lifetime earnings (Chetty, et al., 2014), which does not account for the decline in the value of money over time. The present value of $1.4 million in estimated lifetime earnings discounted at three percent (the discount rate used by Chetty et al.) for 40 years is approximately $430,000 or $15,350 per student.

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Traditional Apprenticeship, Normative Expectations and Sustainability of Masonry Vocation in Ibadan, Nigeria

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Abstract

The purpose of this article is to examine whether the normative expectations among masons has positive or negative influence on young people's interest in masonry. The norms and values a vocation's practitioners operate with may affect the appeal of the vocation to new and potential apprentices. Yet, whether or not a vocation continues to survive depend on how successful its norms and values order expectations of different categories of people in its fold. Data were derived from interviews and focused discussions among 30 masons and 16 apprentices. The results show that normative relations between masons and apprentices increase apprentices' anxiety. There are indications that apprentices find challenging some of the conventions that dictate the process of training. Whereas master masons feel less concern about traditional expectations on apprentices, many apprentices believe that some aspects of informal apprenticeship training process emphasize disturbing social and economic interaction with attendant disinterestedness among apprentices.

Keywords: normative expectations, traditional apprenticeship, masonry, Nigeria

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Aprendizaje Tradicional, Expectativas Normativas y Sostenibilidad de la Vocación de Albañilería en Ibadan, Nigeria

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Resumen

El propósito de este artículo es examinar si las expectativas normativas entre los albañiles tienen una influencia positiva o negativa sobre el interés de los jóvenes en la albañilería. Las normas y valores con que operan las vocaciones pueden afectar el atractivo de la vocación a los aprendices nuevos y potenciales. Sin embargo, el hecho de que una vocación siga sobreviviendo dependerá de cuán exitosas sean sus normas y valores que ordenen las expectativas de diferentes categorías de personas en este ámbito. Los datos se obtuvieron a partir de entrevistas y discusiones focalizadas en 30 albañiles y 16 aprendices. Los resultados muestran que las relaciones normativas entre albañiles y aprendices aumentan la ansiedad de los aprendices. Hay indicios de que los aprendices encuentran difícil algunas de las convenciones que dictan el proceso de entrenamiento. Mientras que los maestros se sienten menos preocupados por las expectativas tradicionales de los aprendices, muchos aprendices creen que algunos aspectos del proceso informal de aprendizaje enfatizan la perturbadora interacción social y económica con el desinterés entre los aprendices.

Palabras clave: expectativas normativas, aprendizaje tradicional, albañilería, Nigeria

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Over the past decades, much scholarly attention has been directed at investigating the roles apprenticeship training plays in supplying occupational skill/training (Wallis, 2008; Parker, 2006; Lehmann, 2005; Breslau, 2003; Kempner, Castrol and Bas, 1993), in heralding youth employment (Sonnenberg, 2012; Epstein, 2008; Valenchik, 1995), alleviating poverty (Igwe and Oragwu, 2014; Hanson, 2005; Sooth and Satchell, 1994) and as a component of development agenda (Steedman, Gospel and Ryan, 2008; Meagher, 2007) in much of West African countries. At the same time, many anthropologists focusing on structure of traditional apprenticeship have described it as learning system that compels immersion in learning environment that, in addition to facilitating technical know-how, structures the practitioners' hard-earned acquisition of social knowledge, worldviews and moral principles that denote membership and status in a trade (Marchand, 2008; Simpson, 2006). However, it has been acknowledged that commonsense understanding of apprenticeship and a good deal of academic research on the subject take for granted that the apprenticeship relation serves to pass on technical knowledge on the one hand and cultural values on the other (Argenti, 2002). This may be a consequence of lack of appreciation of how practitioners' normative expectations shape apprenticeship engagement. Indeed, the habitual work practices as shaped by structure of apprenticeship are less easy to link to the final product of apprenticeship than the technical knowledge. But, as Simpson (2006, p.153) argues, apprenticeship involves disciplined bodies and minds and inculcating a set of patterns of capital and creates a dependent constituency for the master. This is as the social and collective nature of apprenticeship learning system is "inevitably riddled with all the inequalities and contradictions of societies and their collective endeavour".

In view of the strategic importance of apprentice training to manpower development of developing nations (Obidi, 1995) and an increasing emphasis on developing Africa's informal economy to which traditional apprenticeship learning-style is vital, the influence of practitioner normative expectations on apprentices engagement is gaining importance, but little researched. Although structure of apprenticeship have drawn scholarly attention especially among ethnologists (Simpson, 2006), anthropologists (Argenti, 2002) and sociologists (Wang, 2015; Lancy, 2012), until very recently there have been few studies that examined whether the normative expectations among practitioners of apprenticeship has any positive or negative influence on young people's interest in apprenticeship.

In Nigeria, while older practitioners are retiring, fewer young people are picking interest in joining the vocations involving apprenticeship scheme. Few studies such as those conducted by Raheem (2011), Adesina (2008) and Agbola (2005) have tried to explain this phenomenon by suggesting that contemporary Nigerian youth "feel too egoistic" to subject themselves to the seemingly "dirty and energy sapping vocations". Others have identified the economic factor that led many a Nigerian into commercial motorcycling and taxi driving as a potent influence in accounting for this phenomenon (Lekan and Munta, 2008). Thus, while the decline in the numbers of Nigerian youth in apprenticeship training has been a major concern to many scholars (Olaoye, 2007; Agbola, 2005) few studies have linked social practices, practitioners' expectations and its implication. In this context, the aim of our article is to re-examine the phenomenon of Nigerian youth disinterestedness in traditional apprenticeship in the context of pattern of social relations subsisting among practitioners. We explored the processes of traditional apprenticeship training as practiced among and experienced by the Nigerian masons and apprentices respectively. Specific norms and values that influence expectations and pattern of relations between masons and their apprentices are identified and analysed to show possible influence of normative expectations and apprentices' on willingness to join. Accordingly, the core questions that guided this study can be stated thus**:** is the pattern of relations between expert masons and their apprentices a result of the practitioners' expectations and social practices by the expert craftsmen? And in what ways has the practitioners' expectations helped in encouraging apprentices and potential apprentices towards joining masonry and learning the skills?

Normative Expectation and Apprenticeship Training

Generally, both formal and informal apprenticeship training systems have particularly gained scholarly recognition with regard to vocational learning and skills acquisition (Halpern, 2006; Overwien, 2000). Each one is with clear and distinct normative tendencies. Across most of the industrialised societies apprenticeship schemes are formalized. In much of the Western

Europe apprenticeships are paid jobs with features that include "on- and off-the-job learning" that ends with nationally recognised qualifications (Lanning, 2011). There are formal statutory frames of references which spell out pattern of relations amongst actors involved in apprenticeship. For example, the operations of the German apprenticeships are driven in large part by the 1969 Vocational Training Act which specified the regulations under which training in different occupations is conducted and over seen by the Federal institute of Vocational Training (Bynner, 2011) with a focus on content and standard of training (Bynner, 2011; Steedman, 2011). The active involvement of Western governments in apprenticeship governance with regards to policies formulation and content regulations is with a multiple focus on the outcome and benefits of apprenticeship for apprentices, employers and their economies (Byner, 2011; Hayes, 2011; Doel, 2011).

In contrast to the formal apprenticeship training, traditional apprenticeship lack formal governance structure that involves government agencies. In Nigeria, as in many other Sub-Saharan countries, traditional apprenticeship largely emerged out of family apprenticeship system of the pre-colonial era. This was largely unstructured lineage occupational oriented training scheme developed to transmit dominant lineage occupations to the next generation. It is a process of learning whereby knowledge of survival within an environment was transferred through the family (Olutayo, 2010) and it basically involved the household head ('the expert') showing his children ('apprentices') how to grow crops, do a task, craft basket, weave clothes and so on (Collins, Brown and Holum, 1991). The twin factors of simple tools fashioned to explore nature and low level understanding of the environments was responsible for institutionalization and transition of survival skills around the family unit. To a large extent, labour mobilisation for economic purpose was domiciled in the family. So it is unsurprising that acquisition of the essential skills required to participate in the lineage trade was through the family. An essential feature of family apprenticeship is that learning took the form of observations and direct participation with little or no theoretical frameworks.

Historically, Traditional apprenticeship has been important system of learning in much of developing societies. It has served as important source of training to the young people of Africa given its momentous contributions to human and non-human agencies over several decades. In light of this, literature are wont to present traditional apprenticeship training in positive light showing how it could help solve some of the present economic and social problems – including labour supply and skills development problems – in countries where it is still largely practiced (Neil, 2010; Palmer, 2009; Breyer, 2006; and Johnson and Ferej, 1997). Unlike in Western nations where there are marked cross-national differences in "integration of young people into the labour market" (Wolbers, 2007, p.189), in many parts of sub-Saharan Africa this is remarkably similar. A major factor underlying this similarity is the structural similarities of many African economies. For instance, (1) substantial proportion of small and medium scale businesses are in the informal economy; (2) although unemployment rates differ from one country to another, all sub-Saharan African countries are bedevilled with large army of unemployed youths; and (3) over 80% of skills transfer and labour supply into the African informal economies are through traditional apprenticeship training (Palmer, 2009).

However, with all the potential and actual benefits of this system of learning, it is still largely outside the purview of formal training and educational policies of many African countries. Indeed, there are few exceptions in the likes of Ghana, Senegal, South Africa and Mali where there appear to be indications of governments' efforts to formalise this mode of learning by attempting to accommodate it within the national educational policies of their countries (Sonnenberg, 2012; Palmer, 2009). Yet, in many other African countries traditional apprenticeship is left in the hands of unaccredited and unsupervised practitioners (ILO, 2008). In Nigeria, for instance, just as it is with the broader informal economy of the country, traditional apprenticeship enjoys little or no government attention and patronage. It is, as it has being over the years "self-regulating, self-financing" (Johanson and Adams, 2004) and largely structured around "kinship, friendship and philanthropy" (Johnson and Ferej, 1997). There have been few structural supports for training, financing, curriculum development, certifications and accreditation of trainers, in-takes and graduates of traditional apprenticeship training.

The implications of the present circumstance of traditional apprenticeship in the country are numerous but one is essential to this article. This relates to the social process and the attendant social relations among actors involved in the training as informed by the normative practices. The lack of standardisation by government appears to make various tradesmen and artisanal associations to develop their own guiding principles, norms and cultures to suit the peculiarities of different vocations and practitioners (Jawando, Samuel and Odunaike, 2012). In the absence of formal rules and regulations apprentices are not often aware of the does and don't's expected of them. In this circumstance, the social context of learning and the structure of relations embedded therein are based on experiential reality. Because, hand books that explain behaviours and actions expected of an apprentice are mostly unavailable, learning experiences are unstructured; with circumstantial experiences guiding immediate and future actions and behaviour of apprentices.

Even enforcements of rules and regulations are carried out informally through reciprocity, social sanctions and economic compulsion (ILO, 2010). Although, local customs and traditions often play key roles in social processes of traditional apprenticeship, rules of engagement between apprentices and expert craftspeople may not be explicit. In particular, agreements and conditions under which participants (apprentices and expert craftsmen) relate more often than not depend on the whims of the experts. Thus, as with any unregulated systems, traditional apprenticeship system with its peculiar normative scheme may inadvertently encourage arbitrary use of power by one group (experts) over another (apprentices). The question is whether this may play any negative or positive roles in encouraging youth participation in traditional apprenticeship training?

Our article attempt to offer an explanation to this question by examining the norms, values and customs expert masons hold dear in the process of training. This is in an attempt to explain the roles of normative expectations in attracting or distracting young people to serve as apprentices in this vocation. This is considered important because of the view that sustainability of any vocation relies primarily on continued recruitment and successful socialisation of new members into its normative system. As Devine, Britton, Mellor and Halfpenny (2000) observed it is the duty of those with "authorised knowledge" to protect the skills and identity of a vocation through careful control of recruitment and trainings of new entrants as well as the conducts and standard of works of the practitioners. By extension, new entrants must also have proper induction or socialization into the normative schema of a group.

As far as this article is concern, note that the institution of apprenticeship is structured to inculcate much wider socialisation contents that are far beyond skills and trade qualifications. Apprenticeship training expresses the skills, qualifications and substantive regulatory elements a given vocation happens to embrace (Korpi et al., 2003); in turn apprenticeship scheme is one of the main training systems through which vocational knowledge as well as social and behavioural expectations are inculcated in apprentices. Whether or not a vocational trade develops and maintains sustained vocational identity and work ethics depend to a large extent on the quality of its normative schema and how successful its values are absorbed by the new entrants. As Noordergraaf (2011) wrote: "development of regulatory framework allows professional communities to preserve professional identities and integrity" even as regulation of professional behaviours is essential part of the equation. Apart from the skills acquisition content, apprenticeship training include cultural framework by which apprentices become inducted or socialised into knowing and accepting the 'normal' ways of conduct of a group (Lancy, 2012).

Methods

The study was carried out in Ibadan, the capital city of Oyo state. Ibadan was used because of its metropolitan nature. The city has eleven local government areas with five of these known as Ibadan metropolitan/city. The remaining six local government areas are generally referred to as Ibadan less city/rural areas. The large urban stature of Ibadan presupposes continuous construction of various types of buildings which means the city will always require a retinue of skilled artisans like masons. The actual research was conducted in three randomly selected local government areas out of the possible six.

The Fieldwork

Fieldwork was carried out between January and April 2014. Data for the paper was collected through qualitative research method. The main target audiences were expert masons and apprentice masons. A total of forty six masons (30 experts and 16 apprentices) were purposively selected and interviewed. Apart from the in-depth interviews, focused discussions (comprising of average of eight participants) were also organised for different groups of expert masons.

The participants were gathered for the study through visits to on-going construction sites in the three selected local government areas. Initial contacts were made with expert masons to invite them for and to allow their apprentices to participate in the study. The purpose and aim of the study were explained to the expert masons. Where the authors met more than one expert on site, they asked for the lead mason and usually they were directed to the masons that invited other (masons) to participate in the construction process. Often expert masons made themselves available for interviews in the evening after the day's job; none accepted to be interviewed during work hours. We guessed this was to guide against interference with work targets. Nevertheless, we were allowed to stay as long as we wished to observe work process, learning method and pattern of interactions among them. In most cases, the authors were invited into the participants' compound in the evening for the interviews, but 2 or 3 interviews were conducted on site after the day's work. All interviews lasted between 1 and 2 hours.

As indicated above 46 masons accepted to be interviewed and took part in the study: 30 interviews took place with expert masons and 16 with apprentice masons. A 12 item interview guide was prepared and utilised to elicit responses from the interviewees and discussants. During the interview and discussion sessions, we asked expert masons to describe the process of becoming and engaging apprentices, the daily routine/schedule expected of an apprentice, the norms and practices that guide engagement of new apprentices as well as socio-economic relationship with their apprentices. We also asked the masons to describe how apprentices acquire requisite knowledge of masonry. Aside the expert masons, we interviewed apprentice masons. The authors asked the apprentice masons to reflect on their apprenticeship experience, how they learn and from whom they learn. We asked questions concerning their relationship with the experts and their households, the rules that guide interactions with other apprentices and how all of these shape or affect what and how they learn.

The interviews were conducted in Pidgin English (corrupt version of English language popular with semi-literate people in Nigeria) because many of the interviewees have limited command of English language. Data transcription and translation were conducted by the authors. During the process of data collection, we used digital recording gadget to record all interview and group discussion sessions. Everything we heard and observed on field was recorded in either digital table recorder or by taking notes. The combination of these two avails us with the opportunity to relate one set of data to another. Data analysis was done manually. Transcribed scripts were read many times; and the authors coded data in themes for analysis.

Findings and Discussions

From the interviews and focused discussions conducted among expert masons the following normative and customary expectations regarding apprenticeship and apprentice relations were identified. The normative traditions particularly focus on the social context within which apprentices/learners experiences are informed by context of learning shaped largely by masons' expectations and practices.

Normality of Indenture System and Learning

Apprenticeship system among masons is built upon an indenture system characterised by written and financial agreements. This is an important formality and ritual upon which intending learners enters into a non-primary socio-economic relation with expert masons. The indenture system forms the legal basis for the relationship of training in which social and working conditions are regulated (Berneri, 2000). All of our participants are of the opinion that under no circumstance do learning/knowledge transfer (or apprentice-expert relation) between an apprentice and expert mason occur without first agreeing on at least two issues: the number of years an apprentice will be under the guidance and tutorship of the expert; and two financial obligations (the initial amount of money an apprentice or his/her parents pays to be accepted by the expert).

> I learnt building from my master for seven straight years. However, we are now in modern time no child is ready to learn or subject himself for that long anymore; the longest is three years. And this has to be agreed upon by the master and the apprentices or their representatives. Apart from this an apprentice or his/her parent has to

> pay certain amount of money called agreement fee before s/he can be allowed to learn the trade. (In-depth Interview with Expert Masons).

As far as masons practitioners' engagement is concerned, this practice is taken for granted. In fact, the symbolism of this practice was passionately emphasised in a group discussion among expert masons:

> There are laws and traditions guiding the ways we deal or relates with our apprentices. Firstly there is an agreement between him and his master on how much he has to pay to learn the work and how many years he is going to stay with him. All of these have to be discussed and agreed with the apprentices or their parents (Focused discussion with Expert Masons).

Therefore, in practitioners' views, apprentice-expert relation is underlined by bonding system. This is what creates the context upon which learning commences; and apprentices become member of the expert's work group. The bond binding the apprentice is expressed both in writing and symbols. The value of the bond expresses pattern of relations in masonry. Indeed, the indenture system requires the two parties to be thorough; to spell out the details of interaction; and thus convey 'what is in it' message for both parties. That means that in this system both parties relate base on what the immediate gains and costs are (ILO, 2011).

However, the value of the 'goods' (the skill/knowledge) is predetermined through the agreed fees and years of learning even as one of the parties (the apprentice or parent) sometimes has little or no inclination of what he is buying. Yet he has to come under an abiding agreement. The formality of the agreement is therefore a token action underlining the power of master masons over apprentices. This tokenism is well expressed in the sanctity of the agreement which may become obvious and come handy especially during a time of disagreement between the expert and the apprentice. One master mason, who indicated to have trained over twenty masons, explains the sanctity of the agreement:

> The rule (of building association) states that once an apprentice is attached with a master mason, whatever rancor that may ensue between the two of them, no other registered mason may take on such

> apprentice. The guild will rather look for ways to settle such matter than allow someone else to take him over (In-depth Interview with Expert Mason).

This is a ‘marriage’ of permanency. Masonry indenture system compels the social agents (expert and apprentice) to stay together once they come together. No opting out option. Though it recognises human nature that discord may occur, it only recommends that settlement has to be reached. Insofar as no new expert mason will accept the apprentice having being bonded in an earlier agreement, the junior partner (in the agreement) appears powerless. Meanwhile, the more senior partner (the mason) has all the powers. In fact, he has a twin source of power. One, he has the backing of his colleagues in the building trade guild whose rule book bars any other registered mason from accepting the apprentice. And he also has under his control the resource (building knowledge) for which the apprentice strives to gain. This practitioner normative system not only leads to other normative expectations, but it is the main causal factor to explain the subsisting structure of apprenticeship/learning among masons.

Indeed, learning does not occur outside the indenture system. Apprentices are allowed into the expert’s family of learning only after agreed payment has been paid. Sometimes the amount agreed is allowed to be spread over a year or two. But most times upfront payment is demanded by the expert masons. This payment offers learners the opportunity to observe building process, ask questions on grey areas and formally be accepted into the building gang under the leadership of an expert. Building gang is described by the respondents as a group of expert masons, journeymen and apprentices that work together as a work team. What differentiate one building gang from the others is not so much clear. But one thing that is learnt by the authors is that ‘gang’ members treat themselves as a family but has a loose rule of entry and exit.

There is a little or no rivalry noticed among building gangs except with regards to acceptance of a learner from other experts. An apprentice or learner who signs an agreement of indenture with a member of a gang automatically gains membership. He/she has both the opportunity to learn from other building experts in the gang as well as be used as a labour on a job by them. By and large, learning takes many forms. But essentially senior apprentices are customarily empowered to teach new apprentices some of the skills they have acquired over the years. New entrants are encouraged to get close to their seniors, 'respect' them and learn as much as they could from them. In fact it is a rule of thumb for a new apprentice to be friendly to senior apprentices:

> Although an apprentice has to be curious enough to ask question about whatever process (segment of masonry) that is not clear to him, he must show enough respect to those who would show him (In-depth Interview with a Expert Mason).

"Those who will show him" how to acquire the much sorted skills are no others than the senior apprentices he/she met on the job. Another expert explains thus:

> If you are interested in this job you will run a lot of errand for your seniors. He (the new apprentice) must show enough humility and respect to the senior apprentices for him to acquire the skill/knowledge in this vocation or else he learns nothing for the three years or more he will stay with his master. The apprentice will be asked to do different odd tasks, such as buying and serving food, carrying tools and other building implements on his head to and from the work sites and sometimes doing some laundry works for the senior (In-depth Interview with a Expert Mason).

Although, the apprentice signed a pact with an expert mason referred to as *oga* (master) in local parlance, s/he is likely to have little time and temperament of teaching the little details of masonry to an apprentice. That is not the job of the master it is for those (the senior apprentices) "who came on the job before the new apprentice". So at the height of the summit is the expert mason. Below him are the more senior apprentices, and then at the lowest rung of the strata are the newest apprentices. This structure is maintained and underlies every aspect of relations among different personalities occupying each stratum. Being the newest means the weakest and so he is entrusted in the care of the senior apprentice, for perhaps, 'proper' socialisation or induction.

This practice, as it were, places high value on senior apprentices. As it appears, this is based on the assumption that the earlier you join the system the more skilful and knowledgeable you have to be on the job. Whether this assumption is true or not was not tested by us. However, what is clear, as shown above, is that it is the practice (and normative) within the apprenticeship structure for a new apprentice to defer to the senior apprentices to learn and earn the skills sorted. The newest apprentice has to be "humble and respect" those who will show him the "rudiment" of the job. The apprentice may not have the opportunity to learn directly from the expert mason. He is therefore expected to conform to the will of his more senior colleagues in the system.

Therefore, while it may not be part of terms of agreement, practitioners of masonry demands that apprentices pay their dues by being allotted the oddest task which may be out of the purview of actual segment of masonry knowledge. This is the norm or custom irrespective of the ages of the senior and the junior apprentice. Though in everyday context one may argue that what qualifies as humbleness and respectfulness may be contentious and dependent on several situational factors and also on who is asking who (for example in terms of seniority by age), among this work group this is clear and less vague. The newest apprentice must submit himself in total submission to those who by accident of time came on the job before him (regardless of age or background). He must accept to go on errands for the 'seniors' and he must accept to do the oddest tasks in the division of labour. By implications any attempt to reject some kind of 'demeaning' task may be construe as disrespectful or being immodest thus running the risk of learning "nothing for the three years" of his apprenticeship. Consequently, apprenticeship scope of learning for duration of apprenticeship is conditioned as much to his/her aptitude and interest in masonry as it is with his/her ability to develop and maintain 'positive' relationships with all members within the building gang to which his/her *oga* (master) belongs.

Deference, Contractual Opportunity and Expert-Learners' Relationship

It is also expected for all apprentices to hold the experts in high esteem and honour. In the context of apprenticeship relation among this group, expression of *fear* by apprentices for the senior members of building gangs is considered normal. Many expert masons address the issue of deference to the master with words such as "apprentices should not stand shoulder to shoulder with the senior apprentices much less the experts". Apprentices' behaviour or actions are expected to perpetually reflect highest veneration for expert masons. To understand the importance of this within the ambit of apprentice-expert relations we asked respondents to describe how an apprentice mason is expected to relate with his/her *oga* (master/expert). Generally, respondents points out that the social relation between master and apprentice mason is govern by the "fear" of expert masons. An expert mason put this in context:

> In this job you are expected to have utmost fear for the experts. The heart of any apprentice must be filled with such fear of superiority of the experts. An expert mason is like a semi-god to an apprentice. This is because an apprentice is nothing in the sight of his master while he is still learning (In-depth Interview with an Expert Mason)

An apprentice corroborates the above assertions:

> If the expert mason even offended us we could not blame him for any wrong doing. This is because masters and parents have enormous power over a child's life. The master even has bigger power over you because master teaches or shows you the path to economic success (In-depth Interview with an Apprentice).

An expert's power over the apprentices is justified from the standpoint of economic. It flows directly from the knowledge he holds. Since the expert holds or owns a means of survival which is valuable to the apprentices he appears to have (or have been accorded) some kind of power over those who needs or sought after his knowledge. Hence, the social context of learning among masons impose on apprentices condition of total submission and expression of veneration of the expert masons under which he/she intends to acquire knowledge. Thus, it appears what apprentices come to acquire is not only building skills but also the culture of engagement and the normality of fear in the context of learning.

This is better reflected in the fact that irrespective of the skill level of an apprentice, s/he is barred from independently seeking, obtaining and execution of building contract. This general tendency is embedded in the structure of informal apprenticeship learning scheme is also to consolidate the class positions between the master and the apprentices. This becomes expressible in form of appropriation and monopolisation of economic opportunities which leaves little room for competition between the two groups. Among the respondents this assumption is given vent to in the light of the general rules of masonry as operative within the entire structure of mason body (the association/guild). For example, it is emphasised, generally, that an apprentice should not deem it appropriate to obtain a building contract while on training. This is because, as an interviewee explains it:

> Building rules does not allow an apprentice who is still under his master to do that (accept a building contract without notifying the master). The reason is that until an apprentice is given a certificate that he is competent, he cannot negotiate for building contract. Should one of his relatives ask him to help build his/her house he (the apprentice) has to ask his master to obtain the contract; an apprentice cannot obtain a contract until certified competent even if he has the skill (In-depth Interview with an Expert Mason)

When a newly freed apprentice mason was asked directly if he did accepted a building contract while learning he seemed to express a shock at such thought (his askance changed slightly) and he said this:

> No. I never did that for the four years it took me to learn this work. In fact, there was no chance for us to even attempt that because during this period we had to follow our master everyday to work sites except on Sundays which was the only day of rest for us. So all the job I did during my learning period was done under my master. However, he must always ensure that he gives us food and pocket money even when he starves his family he must give us some money because he understands that we are like his tools (In-depth Interview with a newly freed apprentice mason)

We asked the same question during an interview with a master mason:

> No he cannot have such benefit while still an apprentice. For as long as he is yet to be free from the agreement signed with his master he cannot do this. If he did so and the association gets wind of it he will

> be severely punished. What the apprentice can do is to direct the contract to his master (In-depth Interview with a Expert Mason)

This general submission further clarifies the pattern of social relations between master mason and an apprentice under the process of apprenticeship. As it were, an apprentice will not be allowed to flex financial independence while under indenture. He is under an agreement which requires him to be humble and respectful to his master and the more senior colleagues as dictated by masonry tradition. To learn, he/she has to be submissive. For one, subordination of apprentices' labour under the masters' economic opportunity is important to ensure continuous maintenance of specific pattern of relation between the master and apprentices. There is little doubt that economic independence punctures docility and raises self esteems. Hence he should have the privilege of his daily feeding money and no extra. This point is further explained by a senior apprentice:

> Although, we cannot attempt to do a job behind our master, if we are asked we have to refer such job to our master. When he is paid he still will not offer us anything except our regular daily feed money (In-depth Interview with a senior apprentice mason)

As it stands, because the apprentices are, as described above by an interviewee, like tools of business for the master, he has the right to take them to building site, to utilise their labour in execution of building jobs at hand with no expectation of being paid any part of the contractual money. This tends to allow master masons to exploit apprentice labour to the fullest. Therefore, it seems that there is an underneath concern (that of lost of this resource) if apprentices are freed to obtain independent building contracts. Beyond this, this sentiment tends to serve as measure to avoid insubordination from the part of the apprentices. A master mason offers an example of a possible scenario of how an apprentice and his master could come under collision:

> It is not right for a child under apprenticeship to start executing building jobs on his own. What happens if the situation arises where both master and an apprentice chase after the same job? What do you think will happen if a boy you are suppose to be training is not going

> to allow you take a job? We have to avoid such situations at all cost. And this is not only with the builders, you can check all other vocations it is the same (In-depth Interview with an Expert Mason)

Indeed, such situation (where master and apprentices compete for the same building contract) may create unwholesome scenario. If apprentices are expected to fear and defer to their master's will at all time, no apprentice could be allowed to compete for building contracts. Consequently, we suspect that the building association's book rules against allowing apprentices from obtaining a job while under training not just because of the suspicion of competence of the apprentices – since same apprentices are allowed to train the more junior apprentices under them – but because of the implications that such situations have for the entire structure of learning and the general character of social relations that may emerge between apprentices and masters. That means, apprentices are kept under control through financial dependence on either their parents or the master. This will help keep their heads down, humble and focus on the training rather than on financial gains or 'premature' economic independence.

Normative expectations and Youth Disinterestedness in Informal Apprenticeship

Below is the thought of one expert mason on the problem faced in attracting apprentices into masonry profession:

> You know we have problem of apprentices now. There is no child ready to learn anymore. We have investigated and found that today's kids are not ready to learn except that the masters embrace them and draw them with cash (In-depth Interview with an Expert Mason)

Most experts interviewed expressed sadness about this situation and show great concern about the prospect and future of masonry in Nigeria. The experts are pessimistic about Nigerian youth's willingness to subject themselves to a period of apprenticeship as they feel that few if any young person presently want to learn through traditional apprenticeship. This they believed is making it extremely difficult for them (practitioners) to attract youth into the vocation. Indeed, our visitations and observations to informal construction sites confirm that many experts masons are currently with very few (two at most) or no apprentices currently undergoing training and acquiring masonry skills. This is a situation that all the expert masons interviewed believed does not stand the masonry in a good stead:

> Today our youths no longer appreciate our kind of work. Building work is no longer attractive to the younger generation. The way things are today if it is continued this work may cease to exist. (In-depth Interview with an Expert Mason)

The above thought is by no means uncommon among the respondents. For many expert masons who acquired masonry skills through the traditional apprenticeship method they believed the system had function well for years, until a point when many young people began to resist the idea of domination and exploitation of their labour. Though they did not say or acknowledged it, the pattern of power relations embedded in structure and process of traditional apprenticeship system appears to dissuade some young person who may be willing to learn masonry. The low interest in the trade is however widely acknowledged as a problem. But when asked why or what may be responsible for the low interests of youths in the masonry, virtually all of them (master masons) replied thus:

> Many youth of today are indiscipline. They are rude and cannot take orders from those above them. This I think is one major problem; because in my opinion many of them are scared of being disciplined. The rules scare many people away from learning (In-depth Interview with an Expert Mason)

In their socio-economic circumstances (Olutayo, 1994) and the ensuing power positions of the master masons, their perceptions of the unwillingness of young people to become apprentices is that of being belligerent. Others (expert masons) emphasized the role played by formal education in this matter:

> Today's problem in building is caused by education. Because any child with a secondary school leaving certificate feels ashamed to learn this work and many of them have over rated opinions about

> themselves and their level of education. They believe with their school certificates they cannot subject themselves to anybody for years. All they are after is money. This is why young people now prefer to do daily labour which will earn them a daily pay under a bricklayer than to come under him as an apprentice (In-depth Interview with an Expert Mason)

The possible influence of practitioners' expectations, practices and social context of learning presently subsisting are little acknowledged. They (expert masons) did not also factor-in the role played by the lack of adequate monetary compensation for the labour input of the apprentices in execution of building jobs; and the issue of structural domination of the apprentices could not have been a problem to them. These issues, however, as we found out are really important aspects of learning raised by many other respondents (especially the apprentices and recently 'freed' apprentices). For example, the opinion of a newly graduate apprentice directs attention to the extent to which these (practitioners' expectations) could be a problem to contemporary youths who may be aspiring to learn masonry:

> It is difficult to be an apprentice because you have to subject yourself to domineering tendencies of the masters. And I think this is why many young ones do not wish to be one. For example, in 2009 the year I came under my master three of us joined at the same period. Today (2013) I am the only one who is graduating from him all others left because they could not endure. While I was learning I visited my master's household regularly to engage in some house chores like washing his clothes, sweeping his compound and I was even helping his wife in some aspects of home keeping. I do not see many young people subjecting themselves to doing this anymore (In-depth Interview with an Apprentice Mason)

All masters expect apprentice learners under their tutorship to extend their labour to offer personal services in regular upkeep of their household. Little demarcation exists between the 'official' hours of work, official work/duties of apprentices and the domestic responsibilities of the masters' households. It is 'normal' to serve the master and his household during the apprentice years. Apprentices strive to be in the good book and curry favour of their masters' wives as a good insurance to secure the favour of the masters. The ‘fear’ of masters extends to the fear of the wife of the master. Belligerent apprentices who stubbornly refused to create time and space to do house chores in the master’s house could find it difficult to achieve adequate learning. Nevertheless, this finding is not peculiar to apprenticeship process of masonry. It is also the case among those in the process of learning tailoring and other vocations (Jawando et al., 2012). As we gathered master may not be very disposed to reveal the “secret” (or details) of the trade to “stubborn” apprentices. Learning is therefore condition on good perception and attitude of the masters towards the learners.

Nevertheless, all the apprentices masons that participated in the interview sections expressed this as a special concern, but observed that it is a situation they cannot do anything about if they have to achieve their aims (that is, acquire masonry knowledge). Though they acknowledged that it is an aspect of the social process of learning or acquisition of building skills they wish this had not been the case. It consume their leisure or free times and they could not do anything about it for the fear of been seen as disrespectful of their masters. Several apprentices we interacted with and interviewed indicated that this aspect of the social practices of traditional apprenticeship system is discouraging to young ones. In the account of one apprentice, who had spent two years on the training, this practice is an abuse of the apprentices’ rights:

> In the name of been respectful to the masters, apprentices are inhumanly treated. They are treated as little worse than animals tied to a pole that cannot do anything except what is offered to it by its owner. Apprentices have to treat the master with care and treat the wives with even more care. Sometimes I ask myself ‘do we have any rights under the country’s laws’? (In-depth Interview with an Apprentice Mason)

Apparently the above statement is a contrary view to how masters view the whole issue. While it is believed that youth have become less controllable and are scared of been subjected to normal rules of masonry; the apprentices hold contrary view that masters dominate the apprentices. But what is important, to us, is that like in art of marketing of a products or services, words of mouth is a valueless means by which a product or service attracts potential consumers. If apprentices on the job view their situation in unsavoury manner, it is likely and natural that they will gist their friends (outside the structure of masonry) about their conditions. In such circumstance, negative perception and attitude towards apprenticeship become further widespread. And the likely result is 'de-marketing' of masonry to potential apprentices. In any case, another seeming disturbing point with regards to the issue of unwillingness of youth to embrace apprenticeship was mentioned by yet another apprentice mason:

> The reason is a result of modern individualistic orientation of people today. For example while I was learning there was no much heavy dependency on me. But those who are learning this job now are married with children. They have to take good care of their children and wives. How would you ask such individual to work for you and be patient without having to give him enough monetary compensation? (In-depth Interview with a newly 'Freed' Mason)

Non-expectation of financial reward after a day's job has become unacceptable to those who may want to learn masonry. The demographic shift (mentioned in the above statement) show that the needs of those who decide to enter into an indenture with master masons have changed. Marital and fatherly responsibilities make the old custom/practice of labour without adequate compensation unattractive. In fact, in contemporary Nigeria, those who appear interested in embracing the traditional apprenticeship do so for pecuniary advantage. To be sure of this claim we asked master masons to comment on the influence of pecuniary considerations on willingness of young person to become apprentices in building vocation. The following opinion was pervasive in their comments:

> Today money rules and unless you are ready to give apprentices enough cash after the day's job he will not show up the next day. In my opinion the only method to attract them (new apprentices) to learn the vocation is by offering them adequate money for the daily job they do on sites (In-depth Interview with an Expert Mason)

The "daily job they do on site" is tough job. From our observation on the construction sites visited, we noticed that the activities involved in building process make it a hard, energy sapping profession. Participant masons and their apprentices lift heavy loads of sand, cement and blocks from morning till the close of work in the evening. Respondents assured us that the job is not for the fickle hearted or sickly individual. Whatever roles masons or their apprentices are assigned everyone leaves building sites exhausted. That means division of labour between master and apprentice does little to reduce the enormity of work that is daily carried out by either apprentices or their masters. This (labour sapping activities) alone appears discouraging to many in the society as one expert mason offered to explain:

> As you would have noticed, house building is a hard job. It is a kind of job that is going into extinction as people have refused to learn it. Today people prefer to go for jobs that are easier to learn and which can provide them with quick money (In-depth Interview with an Expert Mason)

However, many apprentice masons interviewed believed that appropriate monetary compensations for their roles should help as attraction to youth. In other words, lack of adequate financial offering for the "hard jobs" that are executed on building sites (for the master masons) is a disincentive for prospective apprentices. In stifling economy such as Nigeria's, young individuals require money for survival just as the elderly or the more adult ones. No young person appears willing to accept a condition of agreement which subjects him to serve under a master for three to five years for only "daily feed money". They would rather serve as freelance labour on a building site or opt for less arduous but more lucrative trade. Therefore, it may not be surprising that most of the master masons interviewed believe some urgent steps should be taken to curb the increasing downward trend of enrolment of apprentices into the profession. One of these steps, as opined by majority of apprentices is adequate remuneration for apprentices.

Conclusions

The study explored the potential role of masonry practitioners' expectations in influencing apprentices' engagement and continued interest in masonry vocation. To our knowledge, this is one of the few studies that show the effect of normative expectations on young people's interest in traditional apprenticeship. Our findings reveal that expert masons and their apprentices engage one another based on established practices structured by and rooted in age-long masons' customs. Apprentices' behaviors towards the experts/masters and senior apprentices are part of the extra-learning activities expected of an apprentice. As part of practitioners expectations apprentices are expected to perceive and relate with experts base on the ideal of unequal social position between him and his master. Subservience from the part of apprentices towards the experts is the norm. New apprentices are expected to also learn many of the rudiments of the vocation through senior apprentice whom they are expected to defer to at the slightest opportunity. Though, there is an indenture system in place which spell out what is expected between the apprentices and the expert, the apprentices hardly get taught by the expert. Much of what a new apprentice learn come from those before him on the job which suggest he/she is made to go through some sought of initiation into the job by understanding his/her place/role in the entire apprenticeship structure. What many apprentices (new and old) find almost unacceptable is the practice that ensures that they are not allowed to accept or execute building contracts on their own and by themselves. Though, as we found out, the intention for this practice by practitioners seems to be a noble one – to ensure focus on the training by an apprentice and to control and ensure competence – this appears to be the main factor for the seemingly disinterestedness of youth in apprenticeship training. Many (apprentices) view it as a form of appropriation of their labour with little or no commensurate compensation. While many of the apprentices in the study do not share this custom they, nevertheless, participate and offer due deference to the experts and the senior apprentices as expected of them.

The results further reveal that expert masons' expectations of apprentices which are on one hand rooted in the normative traditions and practices and on the other hand as an extension of the general culture of the people (the Yoruba) among whom the study was conducted are becoming counterproductive for continued subsistence of traditional apprenticeship. This is as apprentices are increasingly showing their displeasure towards how they are treated within the structure of apprenticeship. Although, traditional apprenticeship as presently structured offers few opportunities for apprentices to complain, however, apprentices who cannot bear the seemingly hard condition of learning in this system are disengaging from the scheme, leaving the vocation with few hands that may replace older and retiring masons. This indicates that how apprentices are treated within the social context of learning is important for survival of masonry vocation in particular and the traditional apprentices in general. This point becomes very important when we consider the fact that the Nigerian Federal Government seems to have little interest in how traditional apprenticeship (the main system that produce and reproduce new apprentices for different vocation in the country) is run

Consequently, considering the fact that traditional apprenticeship is very important to masonry vocation, it is advisable for practitioners to reconsider how apprentices experience learning in this system. As it stands today, apprentices do not appreciate nor do they find enjoyable their training experiences as a result of what is expected of them. When training experience is made enjoyable and free of inimical social practices (that make apprentices feel less anxious), then the phenomenon of youth disinterestedness may be reduced, as more apprentices may stay and complete the training rather than the current trend where apprentices opt out as a result of practitioner expectations. Secondly, our study suggested that reward system within traditional apprenticeship scheme needs reshaping to meet modern trends. Lessons can be borrowed from the European system where apprentices are compensated through formalised wage systems. To achieve this, Nigerian government needs to intervene in how the scheme is run; deliberately formalise or standardise the traditional apprenticeship scheme. As it stands presently, apprentices are not awarded formal/government recognised qualification. Although, they receive certificates of completion from their masters after the mandatory three years of training, such certificates are not government recognised which effectively means that they cannot be used to work with the state or obtain government contracts – a big deal in Nigeria. Generally, government involvement in the apprenticeship scheme may go a long way to salvage many vocations (such as masonry) that are gradually going towards extinction as a result of lack of apprentices, by bringing the scheme under the ministry of education or national directorate of employment (NDE) for proper monitoring and policy guidance.

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Gender Equity, Student Loans and Returns on Investment in American Higher Education

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Abstract

This study examines practices that impact females' earnings and, in particular, their ability to repay student loans. Salary inequities experienced by female college graduates along with student loans are addressed. The authors offer a quantitative model for highlighting the inequity in the American workforce considering female's lower salaries and higher student loans by examining the payback period associated with the investment in college education. Results indicate that, while the payback period for investments on college loans is increasing for both males and females, this trend is significantly worse for females.

Keywords: gender equity, higher education, student loans, return on investment in higher education (ROI), payback period

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Equidad de Género, Préstamos Estudiantiles y Rendimientos de la Inversión en la Educación Americana

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Resumen

Este estudio examina las prácticas que impacto las ganancias de las mujeres y, en particular, su capacidad para pagar los préstamos estudiantiles. Las desigualdades salariales experimentadas por los graduados universitarios de las mujeres junto con los préstamos estudiantiles se abordan. Los autores ofrecen un modelo cuantitativo para destacar la inequidad en la fuerza de trabajo estadounidense considerando los salarios más bajos de las mujeres y los préstamos estudiantiles más altos examinando el período de recuperación asociado con la inversión en la educación universitaria. Los resultados indican que, mientras que el período de recuperación para las inversiones en préstamos universitarios está aumentando tanto para hombres como para mujeres, esta tendencia es significativamente peor para las mujeres.

Palabras clave: equidad de género, educación superior, préstamos estudiantiles, retorno de la inversión en la educación superior (ROI), período de amortización

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Gender inequality in post-secondary education in the U.S. has been decreasing gradually since the 1980s. Nowadays, there are more females than males enrolled in post-secondary education and gaining more higher education degrees and such trends are expected to continue (Doherty, Willoughby, & Wilde, 2016; Ewert, 2012; Kena et al., 2016; Snyder, de Brey, & Dillow, 2016; Snyder, Tekleselassie, Mallery, & Choi, 2013).

Scholars have suggested that female students have been exceeding male students in college graduation rates for many reasons including the; (1) decrease of gender discrimination, restructuring of occupations, reform of social norms and family structures, and the increase of female students enrolled in college (DiPrete & Buchman, 2006; Goldin et al., 2006; as cited in Ewert, 2012). Although female students have been increasing in college enrollment, attainment, and graduation rates compared to males, there remain questions regarding gender equality and gender equity. Given the facts that women still earn significantly less than men, that most American students rely on loans to attend college, that tuition in higher education has increased, and that women have to take more student loans than men, can we still claim that we are closing the gender gap? Do females have more burdens to pay off their student loans after graduation? Do these factors contribute to holding women back or keeping them in secondary places to men when it comes to their financial status?

In this paper, the authors review literature regarding female students in higher education and changing women roles in society. Next, the authors explore literature concerning women's student loans and pay inequality. Then they employ the social stratification theory to examine the return on investment (ROI) for higher education and develop a model to describe the payback associated with that ROI. Using the data on the tangible money associated with student loans and subsequent salaries, that model is then applied to develop an equation that statistically describes the inequality in the payback period across genders, in particular, that results from gender disparities in student loans and post-graduation pay.

Objective of the Study

In today's well-advanced countries, women are viewed as having the same opportunities as men. However, upon further examination of current practices and values regarding gender, many disparities and inequities become visible. This study explores the inequality of women's earnings in terms of their impact on their abilities to repay student loans, taking on shared or sole responsibility of providing for their families, and taking active and leading roles in the economy. Is the ROI in education for women equitable with that of men?

Theoretical Framework

Bowles (2013) defined social stratification as, ". . . the systematically unequal distribution of power, wealth, and status" within society (p. 33). Literature suggests that the way men and women are treated in any society is indicative of the power dynamics, wealth and status of men versus women within a particular society (Bowles, 2013; Kerbo, 2000).

Women in our current times represent the majority of college graduates and participate in the work force (Ginder, Kelly-Reid, & Mann 2016), but still struggle for equity. Women are more likely than before to be the breadwinners of their families or even have bigger salaries than their husbands (Parker, 2016). Still women earn lower salaries than their male peers for the same jobs (Corbett, Hill, & AAUW, 2012), take on more college loans, and take longer to repay these loans (AAUW, 2016a). This makes their return on investment in education lower than that of males. The graph below illustrates this relationship. As women earn more college education, take on more breadwinners roles, take more student loans, they still earn less than their male peers and take longer to repay their student loans, which put them at a disadvantage to men. The graph lends support to the gender stratification theory that posits the exiting societal power dynamics and distribution of wealth keep women from reaching equity regarding their ROI in education.

Literature Review

Women in Higher Education

Research indicates that college enrollment of women outnumbers that of men in the U.S. (2016). Ginder, Kelly-Reid, and Mann (2016) reported that female students enrolled in degree-granting institutions in the 2014-2015 school year accounted for 58.1%, compared to 41.9%. male students Degrees awarded to female students made up 58% while male students 42%. All indicators give the impression that we are living in a world that is closing the gender gap; however, inequality persists. The gender gap is closing at a slow pace even though the roles of women in the society are changing at a fast pace.

Changing Roles of Women in Society

Married women are more likely than before to be the primary breadwinners of their families. "Among married couples with children, the total family income is highest when the mother, not the father, is the primary provider" (Parker, 2016, p. 4). Over 22% of families have the mother as the sole earner of the family. In over 40% of American households with children, women are the primary breadwinners with almost two thirds of them being single moms (Finningan, 2015).

According to Parker (2016), 23% of couples have a wife with a higher educational level attainment, and 38% of them earn more than their husbands. These females generally have a higher student loan debt as well. Still women are more likely to take maternity leave, or time off to take care of their children or ageing parents (Parker, 2016). Having higher debt as well as taking time off cumulatively negatively impacts women's ability to ascend the career ladder compared to male colleagues.

Women Student Loans

Tuition and fees in higher education have significantly increased in the last two decades (Ehrenberg, 2007; Willie, 2012). Lucca, Nadauld, and Shen

(2016) reported that $1.3 trillion of student debt has become "the largest form of non-mortgage liability for households." Renehan (2015) stated that attending college has changed from an intellectual pursuit to a financially burdensome risk for students and their families and that it is more than ever before necessary for students to have financial aid and parental support in order to attend college. Hill (2016) argued that 53% of females, compared with 39% of males, pay more money to their student debt than they can reasonably afford.

According to an American Association of University Women (AAUW) report (2016a), women tend to take out more student loans than men and take longer to repay these loans. In the same report, women still earn an average of 79 cents for every dollar men make. This makes repaying student loans more burdensome for women than for men.

Corbett, Hill, and American Association of University Women (2012), in their report stated that,

> as college costs rise and more students borrow more money to finance their education, a surprisingly large and growing percentage of students –especially women –are graduating with high levels of student loan debt burden. … Student loan debt affects both men and women, but it is especially onerous for many women. … Women are especially likely to have high student debt burden, largely because of the pay gap. (p. 26)

In the AAUW report, researchers examined a cohort of college graduates who were employed full time and found that men repaid 44% of their debts in four years compared to 33% for women for the same time period. Comparatively, African American and Hispanic women repaid less than 10% after four years. However, they pointed out these women were contributing more of their income to repay their debts compared to men despite the pay inequity.

Pay Inequality

In the past, women's roles were limited to homemaking and child rearing. This restricted their aspirations and accessibility of higher education and professional occupations. When women pursued work it was believed that they are seeking temporary jobs or trying to provide supplementary family income. Such beliefs led to the long-held practice of offering low salaries to women compared to men with the same level of education and for the same jobs.

Corbett et al (2012) stated that, "Nearly 50 years after the passage of the Equal Pay Act of 1963, women continue to earn less than men do in nearly every occupation" (p. 1), and progress in closing the gender gap in payment has been slow. Kitroeff and Rodkin (2015) found that women with MBAs were earning a median of $35,000 less than men eight years after graduation and took a year longer to repay their student loans than men. Additionally, they found that student loans took 25% of women earnings compared to 14% of the men's earnings.

Research Methodology

The authors formulated a mathematical model especially taking into consideration student loans and pay inequality. The authors employ a grounded theory design which is defined as, "A systematic, qualitative procedure used to generate a theory that explains, at a broad conceptual level, a process, an action, or an interaction about a substantive topic" (Creswell, 2012, p. 423). In this paper, the authors rely on pure monetary investment to measure the ROI in education, without taking into consideration the intangible social returns for education, such as better health, longevity, and life satisfaction.

Model Development

Using a systematic approach of collecting data, the authors have developed a quantitative model that can be used to analyze the data regarding female education, student loans, and gender inequality. To develop that model, the authors reviewed the data on the enrollment and degrees awarded to women's higher education, gender gap in salaries, student loans of higher education in the United States, and loan repayment rates. Having developed the model, the authors:

1. Use model to evaluate the existing inequality in ROI, focusing

in particular on females' ability to pay-off student loans, and
2. Develop recommendations for decreasing the gender gap in the ROI for higher education.

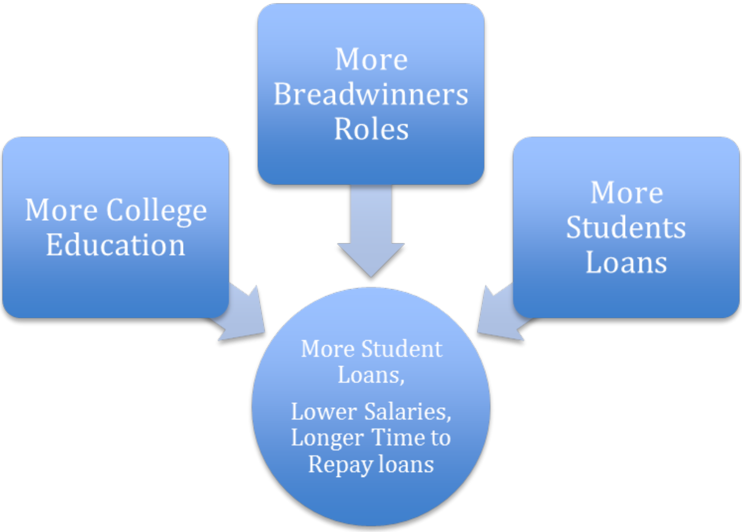

Figure 1. Model Graph of the Return on Investment in Education for Women

Data Collection

Data concerning male and female full-time full-year workers (ages 25 to 34) with bachelor's degrees or higher in the aspects of median annual salaries and student loans were collected and analyzed (see Figures 2 through 5, and Tables 1 through 3). A formula based on the data provided was developed to examine how the gender inequality in terms of ROI is in the US.

Measuring Financial Performance

Various financial measures are available for evaluating the efficiency of an investment, e.g., a college education, and arguably the most commonly discussed of these measures is the return on investment (ROI). While ROI is most often reported as a ratio of net benefits to net investments for a given investment option, alternatively the net return (NR) is sometimes reported instead. Net return is simply equal to the net benefits from an investment, which is that the total benefits minus the total costs of those investments. Related to the ROI and NR (and often used in place of those as measures of financial performance) are the payback period (PBP) and the internal rate of return (IRR). The PBP is the number of years required for the net benefits from an investment to cover the costs associated with that investment. A decrease in the PBP corresponds to an increase in the ROI (and NR). The IRR, which increases along with the ROI, is a more sophisticated measure and takes into account the time value of money, which neither the PBP nor the ROI (or NR) consider. However, for many high-level analyses (such as that conducted in this paper), the PBP or ROI measures will suffice for a general comparative analysis. Thus, providing a reasonable picture of the situations being addressed. In general, an improvement in the ROI (and NR) corresponds to improvements in the PBP and IRR (Gitman & Zutter, 2015). The analysis as follows shows that over time females earn less than males although more females are graduating from institutions of higher education.

Analysis and Results

Pay Inequality

The NCES data show that the medial salary for men was $57,750 (in constant 2014 dollars), whereas women earned $46,250 (NCES 2016). This indicates a difference of $11,500 or 24.86% lower salary for women when compared to men. Median male and female salaries over a 20-year time frame as illustrated in Figure 2 shows the trend of men earning consistently more than women.

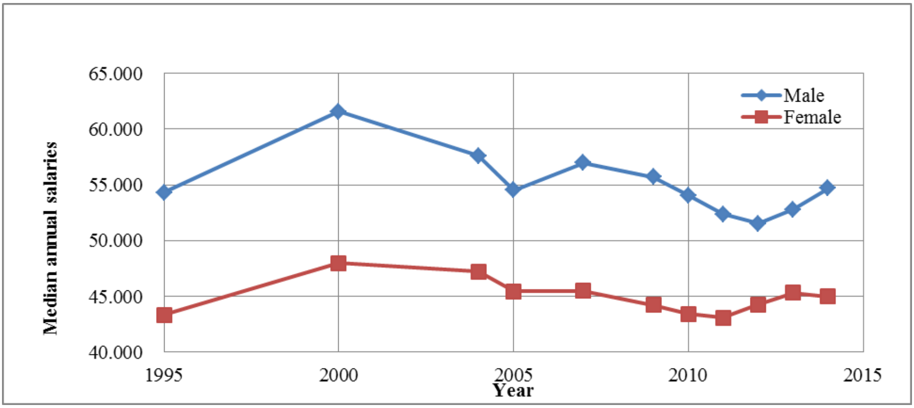

Figure 2. Median annual earnings for full-time full-year workers (ages 25 to 34) with bachelor's degrees or higher. Data source: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 1996 through 2015.

As shown in Figure 2, the actual gap in average salaries for women is consistently lower than men's salary. In 1995 there was a difference of 24%. In 2000 this gap widened to 28.3%. In 2005 there was a reduction to 19.9%. This shrinking of the gap did not last because in 2010 the gap widened to 24.5%. From 2010 to 2015 there was another narrowing of the salary gap. However, the trajectory shows that the salaries for females will remain constant whereas the salary for males is poised to increase. Thus, there is an overall negative trend for females in salary gap over the 20-year period represented by the data.

In addition, this negative trend line for females is further explained by a regression analysis illustrated in Figure 3 and summarized in Table 1. The analysis shown in Figure 3 examines the gap in median annual salaries of females when compared to males over a 20-year period from 1996 through 2015 in constant 2014 dollars. In fact, the R^2 of .3676 shows a weak trend. That is, it indicates it is hard to predict the trend in gender disparities in terms of median annual earnings. Regardless of the weak trend, the "P-value" of 0.047980533 in Table 1 shows a statistical significance, meaning that this is a statistically significant trend. Although this is a statistically significant trend, it is almost hardly considered as a significant trend from a practical standpoint as the "P-value" is so close to 0.05. In addition, the value of -190.72372 (the "X Variable 1" coefficient in Table 1) indicates an average annual decrease of $191 in that gap. This means that the decreased gap per year in terms of salary amount is so small between females and males.

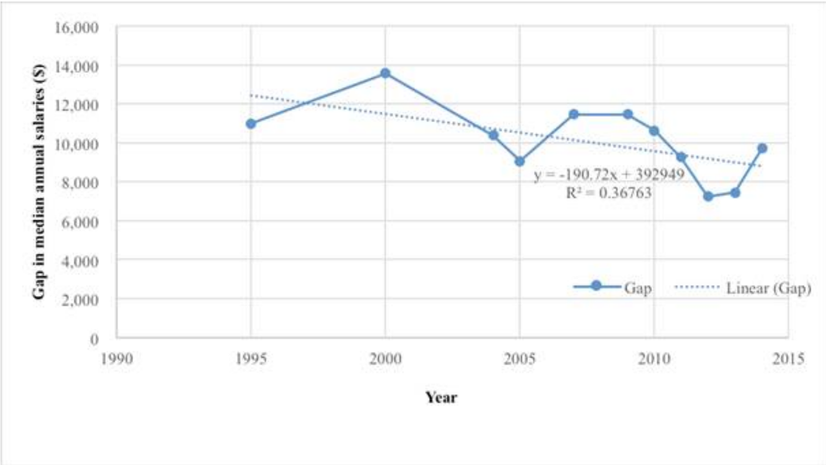

Figure 3. Gender gap of median annual earnings for full-time full-year workers (ages 25 to 34) with a bachelor's degree or higher from 1995 through 2014 (in constant 2014 dollars). Data source: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 1996 through 2015.

Table 1

Regression analysis of gender gap in salaries with a bachelor's degree or higher

Regression Statistics	
Multiple R	0.6063211
R Square	0.3676252
Adjusted R Square	0.2973614
Standard Error	1546.8992
Observations	11

ANOVA

	df	*SS*	*MS*	*F*	*Significance F*
Regression	1	12519798.45	12519798.45	5.232067119	0.047980533
Residual	9	21536074.27	2392897.142		
Total	10	34055872.73			

	Coefficients	*Standard Error*	*t Stat*	*P-value*
Intercept	392949.06	167369.4247	2.347794799	0.043461805
X Variable 1	-190.72372	83.38118313	-2.287371225	0.047980533

Return on Investment

Greenwood Hall, an education technology company, surveyed 2000 adults, 900 of whom were college graduates to gauge their perception of their ROI in education (Ruderman, 2016). Over 50% of them perceived that recent college graduates are receiving less ROI compared to those who graduated 10-15 years earlier. It was argued that the primary reason for the lower ROI rate was the increased cost of student loans.

In 2008, the total NR for education in the United States for males was $567,331, while it was $252,577 for females (ROI in Tertiary Education Report, 2013). The total NR included the benefits for the individual and the society. It was calculated by adding the net private return, which included tuition, food, books, housing, and lost earning while enrolled in college. The net public return was calculated by adding tax revenue, reduced social liability such as public assistance then subtracting unpaid taxes during college and state/federal spending on education. The report acknowledged that several variables such as major and occupational choices, gender, equity, and social expectations influence the gender difference.

A major concern about student loans is the ability to repay them, and this has been an issue of importance to all college students, especially to female students. Although the data used in this study show that women incur slightly less loan debt than men on average, the salary gap leads to greater difficulty for women in repaying their loans.

To consider the gender gap in terms of ROI, it can be helpful first to note the trend in student loans, which essentially serves as a crude proxy for investment. Since 1999, the average annual loan amounts have increased for both male and female students, as indicated in Figure 4.

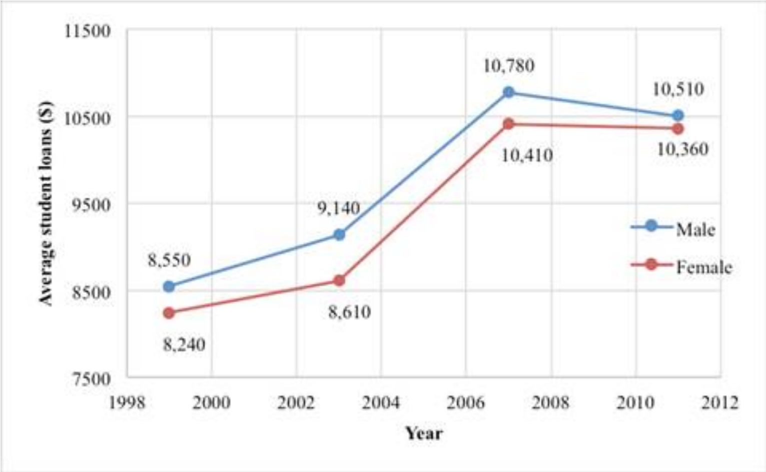

Figure 4. Average annual amount of student loans for full-time, full-year undergraduates by genders Selected years, 1999–2000 through 2011–12 (in constant 2014 dollars). Data source: U.S. Department of Education, National Center for Education Statistics, 1999-2000, 2003-04, 2007-08, and 2011-12 National Postsecondary Student Aid Study (NPSAS, 2000, 2004, 2008, & 2012).

Assuming that loans represent the bulk (although not the sum total) of student investment in education and that this investment is paid out over four years one can consider the return on that investment as being realized by salaries in the years following graduation. For comparison purposes and assuming salary growth to be the same for males and females, one can look at a single year's salary somewhere around five years after graduation. Such a year might be considered representative of the annual return, once the graduate has started gaining traction in his or her career.

Given the above suppositions, along with the NCES data, a crude annual ROI measure for each of four selected graduation years between 1999 and 2011 can be calculated for male and female students. For example, the average male student loans for the 1999-2000 academic year were $8,550. In addition, a reasonable assumption is that the average student takes out loans for six years prior to graduation. Therefore, the average total college investment for those males can be estimated as 6* 8550 = $51,300 per student. The return on that investment five years later (i.e., 2004) was an average salary of $57,600, which yields a ratio of 1.12, i.e., an annual ROI of 12%. Per the same estimation process, the return ratio for women was 0.95 (i.e., an ROI of -5%) for the same time period. (Note that a negative ROI ordinarily implies a financial *loss*, and that the ROI values here represent the ratio of returns for a *single* year to the *total* loan amount invested in the average student's college education. Considering the entire life of the investment would certainly yield positive and relatively large ROI values for both males and females). However, the purpose here is simply to compare the ROI for males and females, and the single year ROI is sufficient for that. The gap in return ratios for that period was 0.17. Figure 5 illustrates this gender-gap based upon the data for the four selected time periods available in the NCES data.

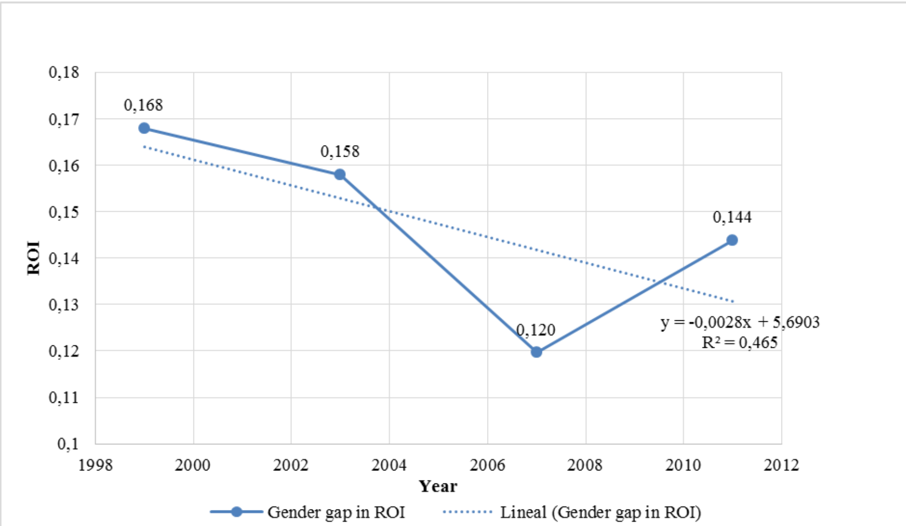

Figure 5. Gender gap in ROI for full-time full-year workers (ages 25 to 34) with a bachelor's degree, selected years, 1999–2000 through 2011–12 (in constant 2014 dollars). Data sources: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 1996 through 2015; U.S. Department of Education, National Center for Education Statistics, 1999-2000, 2003-04, 2007-08, and 2011-12 National Postsecondary Student Aid Study (NPSAS, 2000, 2004, 2008, & 2012).

As can be seen from figure 5, while this gender gap persists, there may be an apparent decreasing trend in the gap. However, that trend is not statistically significant ($p = 0.318$). Although this analysis includes only four data points, it nevertheless provides helpful insights into the persisting lack of equality of opportunity for women as compared to men. That is, based upon the data, it cannot be concluded that the gender gap in ROI is decreasing. In fact, the persistence of the gender gap in returns on investment in higher education can be clearly seen through an analysis of the payback period, i.e., how long it takes to recoup the loans required to finance a college education.

Student Loan Payback Model

The following model, focusing on the payback period (PBP), can be used to provide another perspective for exploring the ROI gap based upon the loan and salary data in the NCES reports. That is, it can be very helpful to consider how long it might take to repay loans taken out during college years. Let t represent a student's college graduation year and let y_t be the PBP, the number of years' worth of the median salary needed to pay back loans accumulated during the student's undergraduate years. Then, if the following represent variables corresponding to values available from the data,

s_t = Median salary for year t
l_t = Average loan amount for year t

and the following parameters (i.e., assumption values)

T = Average number of years to complete bachelor's degree
I = Inflation rate

apply, then the PBP for students graduating in year t is

$$y_t = \frac{l_t\left(T - I\sum_{j=0}^{T-1} j\right)}{s_t} = \frac{l_t(Factor)}{s_t}$$

The numerator here represents the total loans taken out during T years of college, where the graduation year's loan amount, l_t, occurs T times but is adjusted for inflation, I, each year prior to graduation. This assumes the following:

- Entry level salary is the median salary for year of graduation
- All of first year's salary (and part of the second year's salary) goes to paying off the student loans
- Average loan amount for graduation year is borrowed each of the preceding T years, but discounted for inflation at an annual rate of I

Table 2 summarizes the results of the calculations for y_t, the average payback period, where T, the average number of years required to graduate, is 6, and the annual inflation rate, I, is 5%. For example, according to the available data, values for s_t, l_t, and y_t are calculated for 2009 as follows. The inflation compounding factor is calculated as $Factor = 6 - 0.05 * (0 + 1 + 2 + 3 + 4 + 5) = 5.25$, which means that the PBP for males graduating in 2009 would be $y_t = (10780 * 5.25) \div 55700 = 1.016$, while that for females would be $y_t = (10410 * 5.25) \div 44240 = 1.235$. From Table 2, we can see that males' salaries consistently are more in comparison to females', while females take longer time to repay their student loans in comparison to males via PBP from the year of 2000 through the year of 2012. In addition, the student loans between females and males are close.

Table 2
Student loan payback period (PBP) for female and male undergraduates

Graduation Year	Criterion	Male	Female
2000	Salary (s_{2000})	61550	47970
	Loan (l_{2000})	8550	8240
	PBP (y_{2000})	.0729	0.902
2004	Salary (s_{2004})	57600	47210
	Loan (l_{2004})	9140	8610
	PBP (y_{2004})	0.833	0.957
2009	Salary (s_{2009})	55700	44240
	Loan (l_{2009})	10780	10410
	PBP (y_{2009})	1.016	1.235
2012	Salary (s_{2012})	51530	44280
	Loan (l_{2012})	10510	10360
	PBP (y_{2012})	1.071	1.228

Figure 6 provides a graphical illustration of the upward trend in PBP for both genders, as well as the gender effect on that trend. As can be seen in this figure, the y_t values for women (i.e., those above the dotted trend line) are consistently above those for men.

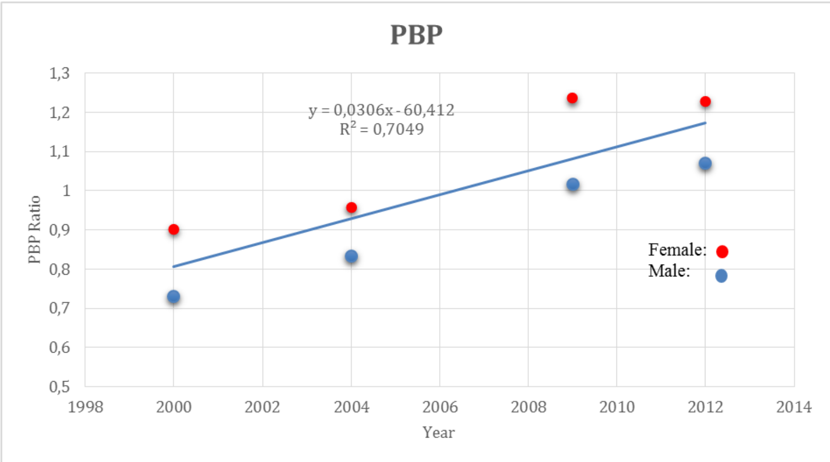

Figure 6. Payback period (PBP) for full-time full-year workers (ages 25 to 34) with a bachelor's degree, selected years, 1999–2000 through 2011–12 (in constant 2014 dollars) by gender. Data sources: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 1996 through 2015; U.S. Department of Education, National Center for Education Statistics, 1999-2000, 2003-04, 2007-08, and 2011-12 National Postsecondary Student Aid Study (NPSAS, 2000, 2004, 2008, & 2012).

A regression analysis of the PBP considering the trend in terms of PBP, as moderated by the gender variable, is summarized in Table 3. Of no surprise, the trend effect, a positive value, is significant at the "P-value" < 0.00389549 level, which substantiates the various concerns often expressed in the literature. This simply indicates that, the PBP has been increasing for both genders. However, more notable is the value of the gender effect, as provided by the regression analysis. It shows this effect to be an average of 0.168 years' worth of salary (as indicated by the X Variable 2 coefficient) required to pay off their student loans. In other words, the average PBP for females is 0.168 years more than for males.

Table 3
Regression analysis of student loan payback period

Regression Statistics					
R Square	0.956726233				
Standard Error	0.044157646				
Observations	8				
ANOVA					
	df	*SS*	*MS*	*F*	*Significance F*
Regression	2	0.215548403	0.107774202	55.27172106	0.000389549
Residual	5	0.009749488	0.001949898		
Total	7	0.225297892			
	Coefficients	*Standard Error*	*t Stat*	*p-value*	
Intercept	-60.49646613	6.804690832	-8.890406284	0.00029961	
X Variable 1	0.030608732	0.003391728	9.024523445	0.000279049	
X Variable 2	0.168441072	0.031224171	5.39457308	0.002955221	

Summary Remarks

While the gender gaps in salaries, student loans, and financial returns on investment in higher education may be decreasing, as indicated by Figures 2 through 5, the gaps persist for the study years. In particular, a substantial gap in the overall affordability of college education, as reflected by the PBP is the result of the combined gender inequities in post-graduation salaries and higher dependence of females on student loans. It clearly takes longer for females on average to repay their college loans than it does for males, and this serves as a major impediment to the financial success and equal progress of females in modern society. The statistical model we offered in this study proves that despite the gains in women's education, access to the workforce and improved salaries, the gap in the return on investment (ROI) as reflected by the Pay Back Period (PBP) we offered lends support to the persistent gender inequality in our society.

Senator Elizabeth Warren at a recent conference, as reported by Izadi (2014) stated, "It is a one-two punch . . . women take on big debts to go to college, but they have less money to pay off these debts." Similarly, Catherine Hill wrote, "People still don't believe that gender is still an issue. a lot of people think this is something of the past, that women seem to be doing well in education" (AAUW, 2016b, para. 4). She contended that women pay more than men for college because they take longer to repay their loans considering their lower salaries and interest on the loans. Our model of analyzing supported this by calculating debt repayment based on gender inequality of salaries.

As college tuition continues to increase, student loans are expected to be $2.5 trillion over the next ten years (Long, 2010). This will further increase the gap between males and females if we don't address the inequality of gender-based salaries. This study provides a clear evidence of the impact of gender pay inequality on females' ability to pay back their loans. This problem may contribute to women declining to pursue higher education.

This inequality can also prevent women from taking risks by changing jobs, taking leadership roles, or starting their own business. The research of Ayala, Lerner, and Schwartz (2010) indicates that, "Gender differences reinforce the explanation for women's entrepreneurial inferiority as resulting from social and economic exclusion and lack of equality. . . [coupled with] difficulties in gaining access to capital and lack of information and assistance" (p. 191). The authors further state that along with grappling with work-life balance, women have tended to be worse off as entrepreneurs compared to their male counterparts due to these inequities. These factors support the stratification of society by gender. The society expects or forces women to take "safe" jobs to provide for their families, while expects men to be aggressive and take more risks during their careers. In many instances stable jobs pay less and have little chances for career advancement, while more risky jobs pay more, have higher dividend, and offer more chances for advancement.

According to social stratification theory, when there is an unequal distribution of resources to any member or group within a society, it is very likely that the group will be defined, positioned and treated in an unfair manner (Bowles, 2013; Kerbo, 2000). This study illustrates how women are viewed and treated by the male-dominated culture and how these views contribute to the persistent gender inequality in salaries despite the changing role of women in the society.

With the passing of the Equal Pay Act of 1963 and the Lilly Ledbetter Fair Pay Act of 2009 there has been significant improvement in the area of gender equity in the United States. The model in Figure 7 provides a snapshot of the many gender equity issues women continue to face in the American society. The model illustrated in Figure 7, reflects the societal impact of gender-based debt equity in the past and present, and provides a positive and futuristic look at the treatment of women. In the past, females had a difficult time getting enrolled in college, having leadership roles, and accessing student loans. These factors were prominent because of the "glass ceiling" effect they faced whereby men dominated these roles. Furthermore, women were not socialized and/or expected to work outside the home. Most women were rearing their nuclear family with their husbands as the primary breadwinner. Hence, a college education was not seen as necessary. Starting in World War I women were needed to work both in and outside the home. More colleges were established and more females had easier and greater access to higher education.

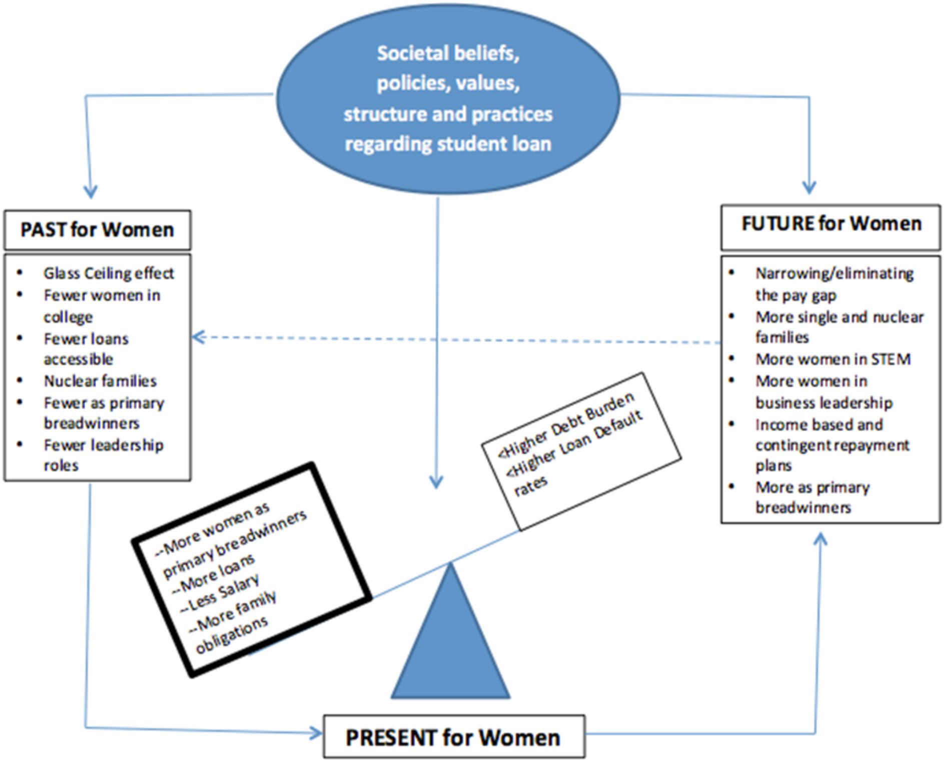

Figure 7. The impact of socialization on female graduates

Today, more women are head of households, leading to more family obligations. Women are represented in the workforce at a high rate yet they are generally compensated at a lower level when compared to their male counterparts. With more women enrolled in and graduating from institutions of higher education, these women have had greater access to student loans resulting in greater debts. This model suggests that women are burdened with more student loan debt than men. Hence, they are on the lower side of the "teeter totter" because of the higher debt burden leading to higher default rates on student loan repayment. This position of unequal burden is reflected in the darker and thicker lines surrounding the issues faced by many women repaying and accessing student loans. Together, societal beliefs, policies, values as well as the structure and practice of student loan acquisition impact gender equity in the past, present and future. This model suggests an optimistic future for women accessing student loans as more women graduate college assume breadwinner roles in families and leadership positions in the workplace. The "teeter totter" is not level for women as yet. With equitable compensation, more access to leadership roles and opportunities for career advancement there can be more balance or equality in how females are compensated. This equality will result in females having less student loan debt, lower default rates on loans and an equal or higher return on investment (ROI) for their pursuits in higher education.

Recommendations

The authors make the following suggestions to address pay inequality and help women ascend the career ladder as well as pursue entrepreneurial and leadership positions:

1. Pay equal salaries to both genders by providing incentives to employers to follow the laws that are in place for equal pay such as the Equal Pay Act of 1963.
2. Provide workshops to educate women and increase employee's awareness of the rules and regulations that address equal pay and fair practices.
3. Expand programs such as Pell grant to reduce the amount students have to borrow.
4. Provide educational training on income-based and income-contingent loans repayment plans.
5. Provide information on programs that pay off student loans such as federal programs, military service, and teaching in high-need areas.
6. Motivate female students to pursue majors or careers that pay more such as those in STEM and business leadership fields.
7. Provide females with financial literacy regarding business and enterprising initiatives in leadership roles.

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Creación de Recursos Educativos Digitales: Reflexiones sobre Innovación Educativa con TIC

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Practicing the Creation of Digital Educational Resources: Reflections about Educational Innovation with ICT

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Abstract

This text analyzes the experience of teaching innovation project called "*Development of audiovisual products as digital educational resources*" which was developed with graders of Social Communication at the Autonomous Metropolitan University Xochimilco (UAM-X) in Mexico City, Mexico; as well as, graders of Teaching at the University of Cantabria (UC) in Santander, Spain. Whereby, the author (using a social-critical perspective) refers, observes and interprets the phases that formed an exercise that aims the creation and broadcasting of videos that in the future can be transformed into digital educational resources. Then, using the perspective of sociology of education, which attaches great importance to social and cultural factors around educational phenomena, the text concludes that the activities of this project are useful because they promote an academic dialogue about the necessity to change the paradigms into the roles of teachers and students in the process of transmission of digitized knowledge; the requirement to educate them in understanding the language of ICT and finally, to recognize their own abilities to make changes and / or improvements to the school dynamics.

Keywords: higher education, educational innovation, digital educational resources, sociology of education, ict in educational contexts

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Creación de Recursos Educativos Digitales: Reflexiones sobre Innovación Educativa con TIC

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Resumen

Este texto analiza la experiencia del proyecto de innovación educativa *Elaboración de productos audiovisuales como recursos educativos digitales*, el cual fue desarrollado con estudiantes de los grados de Comunicación Social de la Universidad Autónoma Metropolitana –Xochimilco (UAM-X) en la Ciudad de México, así como los alumnos de Magisterio en Educación Primaria y de Magisterio en Educación Infantil de la Universidad de Cantabria (UC) en Santander, España. Para ello, se refieren, observan e interpretan desde una perspectiva socio-crítica las fases que integraron un ejercicio teórico-práctico que impulsó la creación y la difusión de videos con vistas a configurarse en recursos educativos digitales. Luego, desde la perspectiva de la Sociología de la Educación, la cual dota de gran importancia a los factores sociales y culturales alrededor de los fenómenos educativos, se concluye que las actividades que integran el Proyecto favorecen la formación de los alumnos porque permiten: a) dialogar (académicamente) sobre la necesidad de modificar los paradigmas en los roles de profesores y estudiantes en el proceso de transmisión del conocimiento digitalizado; b) señalar la necesidad de educar en la comprensión de los lenguajes de las TIC; y finalmente; c) reconocer sus propias capacidades de realizar cambios y/o mejoras a la dinámica escolar.

Palabras clave: educación superior, innovación educativa, recursos educativos digitales, sociología de la educación, tic en contextos educativos

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Las discusiones sobre el acceso y el uso de las Tecnologías de la Información y la Comunicación (TIC) en contextos escolares son frecuentes. También los debates en torno la potencialidad de estos instrumentos para la participación más activa de docentes y discentes, no solo como usuarios sino como creadores de contenidos educativos. Este texto, mediante la reseña, la observación y la interpretación del proyecto *Elaboración de productos audiovisuales como recursos educativos digitales* (en adelante Proyecto) pretende ser un aporte al debate académico sobre: a) la utilidad de desarrollar actividades teórico-prácticas con recursos TIC, ya que estas permiten dialogar sobre la importancia de transformar los paradigmas en los roles de profesores y alumnos en el proceso de transmisión del conocimiento digitalizado; b) la necesidad de educar en la comprensión de los lenguajes de las TIC, más que en la adquisición de habilidades técnicas, ya que como se insiste desde las teorías de la reproducción del ámbito sociológico, será fundamental que las instituciones educativas doten a los alumnos de herramientas que les permitan significar de forma crítica los contenidos que ofrecen estos medios de interacción social y educativa en formatos virtuales; y c) el beneficio para que alumnos y profesores constituye la identificación de sus propias capacidades de realizar cambios y/o mejoras a la dinámica escolar. Así, el propósito del texto es, mediante el análisis y la interpretación las actividades de proyecto *Elaboración de productos audiovisuales como recursos educativos digitales,* señalar el papel de las TIC como herramientas y como canales, pero sobre todo como soportes de discursos simbólicos que (cada vez más) forman parte del proceso de producción, reproducción y distribución de las estructuras, la organización y los saberes institucionalizados; y luego, su importancia en la búsqueda de cambios y mejoras en el proceso de transmisión de conocimientos escolares, a través (en este caso) de la creación de recursos educativos digitalizados como discursos alternativos al dominante.

Siguiendo a Martínez González (2007, p.13) se considera de gran relevancia llevar a cabo investigaciones sobre realidades educativas para (a través de la innovación) intentar cambiar y/o mejorar algunas prácticas educativas. Para esta autora, desarrollar y observar sistemáticamente este tipo de acciones permite “analizar con rigurosidad y objetividad una situación educativa” que servirá para realizar valoraciones y diagnósticos sobre la misma. En este caso se observa un proyecto que derivó en la elaboración de productos audiovisuales como recursos educativos mediados por la tecnología digital por parte de alumnos de 83 alumnos de Grado de Educación Infantil y Primaria de la Universidad de Cantabria (UC en Santander, España) y de 60 alumnos de Grado de Comunicación Social de la Universidad Autónoma de México – Xochimilco (UAM-Xochimilco, en Ciudad de México), durante los cursos académicos 2014–15 y 2015-16; y que siguió un método de enseñanza- aprendizaje que pretendió colocar a los alumnos como productores de discursos audiovisuales para contextos educativos. "El protagonismo es una oportunidad para que [los estudiantes] contribuyan a seleccionar recursos disponibles en la red según preferencias y necesidades, contribuyendo asimismo a la elaboración de contenidos y a la creación de conocimiento" (Durall, Gros, Maina, et. al, 2012, p. 17).

Así, la observación del Proyecto como un conjunto de actividades que permitieron experimentar el uso de TIC en contextos educativos como un recurso tecnológico y como una metodología de enseñanza-aprendizaje que posiciona al alumnado como productor de conocimientos, se rigió bajo los preceptos de la línea de investigación socio-crítica que vincula la teoría con la práctica y cuyo objetivo es "formar a personas para que desarrollen su capacidad de reflexión crítica y les permita analizar sus propio contexto y realidad cotidiana" (Martínez González, 2007, p. 33). Así, el Proyecto se desarrolló en el espacio de dos asignaturas de grado con perspectiva sociológica común, pero en contextos geográficos diferenciados.

En la primera parte del texto se establecen los razonamientos teóricos utilizados para observar e interpretar el Proyecto. En la segunda parte se exponen los elementos que integraron el proyecto. La última parte comprende la interpretación y la valoración de los resultados del Proyecto, es decir, de la experiencia de creación de grabaciones audiovisuales como recursos didácticos digitales y sus implicaciones en contextos educativos.

Fundamentos Teóricos: Tic e Innovación Educativa

El Proyecto es en esencia un ejercicio práctico. El diseño, creación y presentación de los productos digitales fueron experiencias empíricas; sin embargo, esto no excluye que sus fundamentos teóricos encuentren cabida en las reflexiones académicas sobre el uso de TIC en contextos educativos.

Una de las funciones sociales de la escuela es la de complementar los procesos de socialización de los individuos. En el caso de la educación superior, es fundamental introducir experiencias formativas que contribuyan a facilitar las exigencias de interpretación de los lenguajes de los productos y los canales digitales. Además, propicia el aprendizaje de pensamientos críticos sobre el acceso, uso, consumo y producción de los contenidos de los medios audiovisuales; o incluso respecto a la promoción de la responsabilidad social a través del uso, disfrute y aprovechamiento de estos. Por ello, el Proyecto propone la elaboración de productos audiovisuales como recursos educativos, para ejemplificar que, como discursos alternativos al dominante, podrían mejorar y/o cambiar algunos aspectos de las metodologías docentes de nivel educativo postobligatorio. A continuación, se delimita este concepto y se destaca su importancia como estructura de legitimación de determinadas formas de interacción social.

Como punto de partida, se establece el currículo escolar como un conjunto de materiales (tangibles o digitales) que promueve un particular tipo de aprendizaje. Estos elementos poseen la capacidad de incidir en la producción, la reproducción y la distribución del saber, porque desarrolla una precisa función social en la construcción de la cultura "y no sólo en sentido genérico, sino también desde una perspectiva institucional atenta a las singulares dinámicas que modulan su recreación y creación de la escuela" (Romero y Luis, 2008). Así, desde una la línea de pensamiento del análisis de la cultura y de las representaciones sociales, el currículo escolar es un conjunto de prácticas políticas, sociales y pedagógicas necesarias para la reproducción de específicos conocimientos, habilidades o destrezas, actitudes y valores. Es decir, es una construcción social y política capaz de dotar de significado a ciertos valores y principios que integran, justifican y legitiman una determinada forma de organización de los contenidos escolares. El currículo escolar posee gran importancia en el proceso de producción y reproducción de conocimientos, porque al referir un sistema de valores, normas, convenciones, sobrentendidos, prácticas diarias, rutinas y disposiciones organizativas que existen en un centro escolar concreto, tiene capacidad de influir en la manera de pensar e incluso en la forma de interaccionar de los distintos integrantes de los centros escolares.

En contextos educativos (occidentales) mediados por las TIC, cada vez más se presentan cambios que impactan (desigualmente) las formas de organización y las metodologías docentes tanto en los niveles de enseñanza básica como en la postobligatoria. Cada vez más, la llamada cultura formativa-educativa

> que coloca la centralidad del aprendizaje en el estudiante y que se fundamenta en el uso de tecnologías" lleva a la necesidad de reconocer "la capacidad y responsabilidad del estudiante para aprender cierta autonomía; una autonomía diferente de la labor del docente y una infraestructura tecnológica que favorezca la participación, el trabajo colaborativo en redes de aprendizaje y las comunidades de práctica (Durall, Gros, Maina, et. al., 2012, p.18).

La integración de recursos tecnológicos y la digitalización de la información en las instituciones de educación superior, exige la reconfiguración de las representaciones colectivas y, por ende, de las estructuras y de las prácticas en cuanto la producción, el procesamiento y la distribución del conocimiento. Es decir, la informatización de los entornos educativos desvela como trasfondo un necesario cambio cultural en las orientaciones de las acciones y de los recursos pedagógicos. Es necesario modificar las estructuras de las instituciones superiores, ya que "muchas de las dificultades para incorporar las TIC radican en los modelos organizativos actuales de las organizaciones educativas. Las universidades continúan implementando modelos educativos tradicionales que dificultan la creación de nuevos escenarios de comunicación y educación con las TIC" (Durall, Gros, Maina, et. al., 2012, p. 3). Así, es fundamental desarrollar acciones de alfabetización mediática que pretendan, no solo promover el acceso a los medios de comunicación, sino que sean capaces de trascender el concepto de alfabetización verbal y de lectoescritura, para incluir lenguajes y formas de expresión basadas en la imagen digital fija y en movimiento. Siguiendo a Gutiérrez y Tyner (2012, p. 10), "en este proceso de transformación, la alfabetización mediática contempla la aparición de nuevos medios de comunicación dentro de los contextos históricos, culturales, sociales y económicos de la alfabetización".

Al observar el proceso de enseñanza-aprendizaje desde algunos de los fundamentos de la sociología de la educación (que consideran relevantes los entornos económicos y políticos –pero sobre todo los sociales y culturales– alrededor de las acciones educativas, así como a las relaciones de fuerza que alrededor de las mismas) se destaca la importancia que tienen otras agencias de socialización, además de la escuela. De esta manera, siguiendo a Pérez y Delgado (2012) se considera que la alfabetización digital (nombrada así de manera genérica) en contextos de educación básica (pero también posobligatoria) ha de impulsar el desarrollo de habilidades no solo de acceso, sino de uso e interpretación de herramientas TIC, de manera que permitan al alumnado interpretar y reelaborar la información a su disposición.

> Las instituciones de educación superior deben tener en cuenta el valor único que cada persona agrega a un mundo en el que la información está en todos partes. En este nuevo escenario la capacidad de evaluar la credibilidad de la información y la creación de sentido son primordiales (Durall, Gros, Maina, et. al., 2012, p. 17).

Para ello es necesario contar con contextos extraescolares que permitan la utilización de estos conocimientos y habilidades, ya que de otra forma la alfabetización digital no resulta en estrategia de inclusión socio-tecnológica. Para que así fuera, tendrían que coincidir factores económicos, políticos, sociales, culturales, ya que "la situación política y sociocultural de un grupo social forma sus normas y valores, lo cual a su vez influye en el significado que se le da a un artefacto" (Pinch y Bijker, 1987 en Perazzo, 2008). Es decir, será fundamental dotar de relevancia, además de las políticas públicas que podrían favorecer o no la dotación de recursos tecnológicos, a los actores, quienes mediante sus prácticas en contextos educativos, son quienes elaboran y reelaboran los conceptos alrededor de las TIC.

Dado que el Proyecto pretendió elaborar videos originales para contextos educativos formales de nivel superior, a continuación se presenta una concisa descripción de la noción recurso didáctico digital como parte del currículo escolar: se entiende como el conjunto de materiales digitalizados, producidos con el objetivo de facilitar el desarrollo de actividades de aprendizaje. Así, su objetivo es favorecer la transmisión de conocimientos, la adquisición de habilidades e incluso el fomento de determinados valores (Zapata, 2012). Se diferencian de otros recursos educativos (como por ejemplo los documentos tangibles –libros u otros materiales impresos–) porque constituyen discursos multimedia, es decir, están nutridos, además de textos o imágenes, de sonido, videos, simuladores, laboratorios virtuales, bases de datos y gráficos interactivos. Utilizan un formato que ofrece una red de conexiones entre los bloques de información, por lo cuales se puede "navegar", siguiendo itinerarios personalizados y su lectura exige dispositivos electrónicos y disponer de conexión a Internet. (Zapata, 2012).

En la actualidad estos instrumentos resultan de gran utilidad para la adquisición de conocimientos. Para Zapata (2012), entre las ventajas de la utilización de los recursos, destaca su formato en cuanto que: permite la presentación de los contenidos (animaciones y tutoriales audiovisuales) de manera más motivadora; admite el uso de simuladores y laboratorios virtuales, que representan situaciones reales o ficticias a las que no es posible tener acceso en el mundo real cercano; permite modular el ritmo de aprendizaje en cuanto que cada estudiante puede consultar los materiales de forma personal; algunos ofrecen la posibilidad de acceso abierto

> donde los autores tienen la potestad de conceder una forma de licencia CreativeCommons a sus recursos educativos que publican en la WEB, o de compartirlos con otros usuarios en espacios de la WEB 2.0 y en espacios orientados a generar redes sociales (Zapata, 2012, p. 4).

El uso y la creación de TIC en contextos educativos formales implican la creación, la búsqueda y la selección de recursos educativos digitales en función de objetivos particulares. Es decir, los recursos educativos digitales pueden facilitar la comprensión, la interpretación y la apropiación de la información; sin embargo, a pesar de que los formatos de los recursos educativos digitales ofrecen opciones multimediales, interactivas y de fácil acceso, por sí solos no garantizan efectividad en el logro de aprendizajes significativos ni críticos (Zapata, 2012; Quirós, 2009). Más aún, su proceso de creación de contenidos educativos originales, creativos y contextualizados, exige (tanto del profesorado como del alumnado), en primer lugar, manifestar un profundo conocimiento del tema a abordar; en segundo lugar, establecer un objetivo de enseñanza-aprendizaje, para delimitar los contenidos, y que además, permitirá escoger el recurso TIC para soportarlo, y los procedimientos metodológicos que facilitarán la aproximación de los estudiantes al objeto de estudio (Ospina, 2004 en Zapata, 2012).

En el ámbito pedagógico existen numerosas investigaciones sobre prácticas e innovaciones en contextos escolarizados relacionadas con el uso de herramientas TIC (Area, 2008 y 2010; Castillo, 2008; Martínez y Heredia, 2010; González Mariño, 2008). Son menos las que desde la Sociología de la Educación abordan esta cuestión. Balanskat, Blamire y Kefala revisaron 17 investigaciones e informes sobre el impacto de las TIC en los sistemas escolares (en los niveles de educación primaria y secundaria) de Europa y concluyeron que, "a pesar del incremento de la disponibilidad de recursos tecnológicos en las escuelas, (…) la práctica pedagógica de los docentes en el aula no supone necesariamente una alteración sustantiva del modelo de enseñanza tradicional" (en Area, 2010, p. 6). Es decir, en el caso de educación básica, el uso de estas herramientas no ha constituido un cambio significativo en los procesos de enseñanza-aprendizaje. Esto es, observaron, por ejemplo, que los profesores usan las TIC para apoyar las pedagogías existentes, como pueden ser las exposiciones magistrales en la que se encubre ideas y dinámicas pedagógicas en las que el profesor es el único emisor válido para la transmisión de los conocimientos, mientras que el alumnado es un mero receptor.

De sus planteamientos, se concluye que el uso de las TIC en contextos educativos europeos y también de América Latina tiende a reproducir modelos de enseñanza probados y estos medios o instrumentos no necesariamente impulsan innovaciones pedagógicas. "El ordenador que puede contribuir a que el alumno amplíe la información, realice ejercicio o establezca alguna relación interactiva, pero con el mismo objetivo: aprender determinados contenidos y dar cuenta de ello en la evaluación correspondiente" (Marchesi y Martí, 2003, p. 115 en Area, 2008, p. 7). En otras palabras, se señala que la integración de las TIC en el currículo escolar precisa de un modelo pedagógico que otorgue sentido al uso de las mismas con perspectivas innovadoras y vinculadas a los propósitos de las competencias mediáticas (Pérez-Ortega, 2016). De esta manera, un sistema educativo rígido y poco dinámico, que da gran importancia a la memorización de los conocimientos, no propicia proyectos que busquen cambios y/o mejoras. De acuerdo con Area (2008) para lograrlo, será preciso que el currículo escolar promueva, además del acceso y uso de software y hardware, la adquisición de competencias relacionadas con búsqueda, análisis, selección y comunicación de datos e información para que el alumno la transforme en conocimiento. Es decir, en proyectos educativos que privilegien el acatamiento y el autoritarismo, y en los que los conocimientos se adquieran mediante ejercicios de memoria y repetición, no se promoverá la participación del alumnado, tan importante en los procesos de innovación con herramientas TIC.

Las formas de socialización han cambiado radicalmente, han adquirido una dimensión mediatizada caracterizada por la digitalización de las relaciones sociales. "Lo cotidiano se construye en esta red tecnológica y mediática, en donde los individuos tejen su camino en la sociedad, ahora mediatizada" (Riffo, 2015). En este contexto, los medios de comunicación masivos y las TIC son importantes soportes para las expresiones culturales. Son espacios idóneos para la creación, la recreación y la transmisión de la diversidad y la cantidad de contenidos (en general estandarizados) a nivel global. En la práctica resultan recursos idóneos para la diseminación (e incluso consolidación o desarraigo) de ciertas referencias culturales; no obstante, no se ha de olvidar que quienes generan contenidos son personas y/o instituciones con fines específicos. En el caso de las instituciones educativas, los recursos y los contenidos digitalizados podrían fortalecer modelos educativos que promuevan formas de explorar, representar y adquirir nuevos conocimientos. Por otro lado, las innovaciones educativas podrán potenciar la incorporación de nuevos contenidos (digitales o no) en el currículo escolar y la identificación de necesidades de formación tanto de comunicadores (y comunicólogos) como de educadores. Consecuentemente, el Proyecto fija la necesidad de identificar las demandas y las necesidades didácticas, espaciales y tecnológicas, mediante el acopio sistematizado de las mismas a través de un análisis documental.

Diseño y Desarrollo del Proyecto

En esta sección se describen las actividades que, en el marco del Proyecto se desarrollaron. Es decir, después de significar ciertas nociones, se hizo necesario diseñar las estrategias y las acciones que permitieron la articulación dialéctica y multidisciplinar que pretende el ejercicio. Sigue la descripción de la delimitación del contexto institucional, el proceso de establecimiento de objetivos de innovación educativa, así como las metas, la justificación y la evaluación de los mismos.

Teniendo como marco institucional un convenio de colaboración académica y de investigación entre el Área de Sociología del Departamento de Educación de la UC y el área “Alfabetización mediática y cultura digital” del Departamento de Educación y Comunicación de la UAM- Xochimilco (desde septiembre de 2013), se discutió la conveniencia de promover un ejercicio teórico-práctico que buscara la creación de materiales educativos digitales por estudiantes que contribuyera a debatir sobre la importancia de forjar un marco socio-pedagógico y humanístico que promoviera este tipo de ejercicios. Así, se les propuso la grabación y la presentación pública de un video original (llamado “Cápsulas informativas”) de duración máxima de cinco minutos en los que se expusieran de forma original y creativa, temáticas relacionadas con las TIC en contextos educativos.

Concretamente, el Proyecto nació de las necesidades de explorar las oportunidades que brindan las TIC como herramientas pedagógicas y socio-críticas; y como práctica del proceso de creación de innovaciones educativas, en el marco de la asignatura “Sociedad, Cultura y Educación” (cuyas temática y teorización giran en torno a la Sociología de la Educación) del primer año de los Grados de Magisterio en Educación Infantil y de Magisterio en Educación Primaria, ambas impartidas en la UC.[1]

La participación de los alumnos del grado de Comunicación Social (matriculados en el área de concentración “Alfabetización mediática y cultura digital”)[2] de la UAM- Xochimilco, complementó el ejercicio en tres puntos, que llevaron a: a) Estudiar (observar, escuchar e interpretar) los materiales elaborados por los alumnos de la UC, para calificar los contenidos audiovisuales con el propósito de organizarlos como estrategias para desarrollar el proceso de enseñanza-aprendizaje mediado por TIC, después; b) Sirviéndose del propio marco teórico sobre la producción de mensajes y técnicas de comunicación audiovisual en formato digital, reelaborar los discursos de manera que crearon lo que denominaron “Cápsulas informativas”; c) Discutir el papel de las TIC en ámbitos educativos; concretamente se centraron en la necesidad de formarse en la creación de nuevos contenidos y el uso de herramientas de tecnológicas y digitales para su difusión en contextos educativos.

De manera sintética, se establece que las metas que se propuso alcanzar el Proyecto fueron: a) Desarrollar debates teóricos sobre el uso de las TIC en contextos educativos como facilitadores del proceso de enseñanza–aprendizaje en cuanto herramientas multiplicadoras de lenguajes didácticos y por ello, capaces de motivar cambios y o mejoras educativas; b)

Experimentar el diseño, la pre-producción, producir y post-producir) y la difusión (presentación pública) de productos audiovisuales originales como posibles innovaciones educativa; c) Evaluación grupal de los alcances del Proyecto.

El establecimiento de estas metas llevó a la delimitación y a la organización de las actividades alrededor del video, ordenadas en temporalidades diferenciadas entre sí y en contextos educativos específicos, de la forma que a continuación se describe; sin embargo antes se anota que los puntos 1 y 2 fueron desarrollados en ambas universidades en tiempos diferentes (en función de la organización de los calendarios en cada una). Luego, desde el 3 y hasta el 6 describen los pasos que realizaron los alumnos de los grados de Magisterio en Educación Infantil y Magisterio en Educación Primaria la UC; mientras a partir del punto 7 se relatan las actividades en las que participaron los del grado de Comunicación Social de la UAM – Xochimilco.

1. Presentación de los objetivos, metodología y evaluación del proyecto en ambas universidades por parte de los profesores responsables de la asignatura (UC) y del área de concentración (UAM – Xochimilco).

2. Delimitación teórica de los conceptos subyacentes, mediante análisis sistematizado y posterior debate colectivo de los mismos.

3. Preproducción. Delimitación de los contenidos y reflexión sobre la forma de abordar el mensaje a ofrecer mediante un canal audiovisual. Para ello fue preciso la identificación de los recursos humanos y materiales para la elaboración del mismo. En síntesis, esta actividad exigió la elaboración del guion (o storyboard) y la selección (o scouting) de locaciones y horarios de grabación del material.

4. Producción. Proceso de grabación del material en las locaciones y horarios elegidos.

5. Postproducción. Edición casera y con recursos digitales (programas) de libre acceso. Concretamente, para la edición del material se usaron los siguientes programas de edición de video gratuitos para Windows: Windows Movie Maker, VirtualDub, Wax, Avidemux, FFMpeg, Blender, entre otros. Destaca que hasta el momento, las acciones descritas fueron desarrolladas por alumnos de Magisterio en Educación Infantil y Magisterio en Educación Primaria de la Universidad de Cantabria, por lo que no cuentan con competencias de manejo de TIC formalizadas.

6. Difusión. Presentación pública del video en la UC y evaluación del producto. Cabe señalar que en esta parte del proyecto se revisó y calificó el trabajo colectivo de los alumnos como el resultado de un proceso de elaboración de un discurso audiovisual que pretendió dotar información (a otros universitarios) sobre varios conceptos vinculados a las TIC de forma original y creativa. Por ello, se prestó más atención al contenido que al formato.

7. Visualización de los productos finales elaborados por los alumnos de la UC con la finalidad de reflexionar en manera de mejorar el formato, de manera que el objetivo fue: "Reelaborar el formato de presentación de los productos audiovisuales elaborados por alumnos de la UC sobre conceptos relacionados con TIC de manera que se favorezca visual y auditivamente la comprensión, la apropiación y la significación de la información en contextos transnacionales. Siendo el reto último la elaboración de cápsulas informativas"

8. Con el objetivo de incrementar la calidad audiovisual de los materiales originales, los alumnos de la UAM –Xochimilco se centraron en la resolución de problemáticas del lenguaje gráfico y de audio. Para ello, se revisó y se calificó el material en función de su utilidad como mensaje multimedia que recoge y reproduce un determinado contexto enunciativo; es decir, al analizar los videos realizados por los alumnos de la UC se revelaron, además de los recursos técnicos que usaron, sus puntos de vista, intereses, gustos o necesidades como realizadores.

9. Luego, se editó y se montó en un nuevo soporte, en forma de "Cápsulas informativas" apto para su reproducción de Windows; para ello utilizaron programas licenciados como el software de Adobe® Photoshop® con la versión CS5. También se usaron otras herramientas de diseño gráfico digital para video como Adobe® Premiere® Pro CS5 para la edición en diversas plataformas y AVID Technology disponibles en la UAM – Xochimilco. Se destaca que también se permitió el uso de las herramientas Inkscape, GIMP y Jahshaka por ser software opensource y con elevada calidad profesional.

10. La presentación pública de las "Cápsulas informativas" estuvo acompañada de un debate teórico que se centró en dos cuestiones: a) Señalar que su utilidad como materiales educativos radica en su capacidad de re-producir ciertos aspectos de la realidad en que fueron elaborados. Es

decir, permiten observar, estudiar y analizar situaciones y contextos a través de imágenes y sonidos como representaciones colectivas. b) Reconocer que el uso de videos en el proceso de enseñanza-aprendizaje es una tendencia que se va afianzando, por lo que es preciso responder a la necesidad de formación en cuanto a competencias de alfabetización audiovisual entendida como la capacidad para leer, construir y comprender signos, símbolos y mensajes visuales a partir del reconocimiento de su estructura formal (Dondis, 1990).

Finalmente, se realizó la evaluación de las "Capsulas informativas" como producto final audiovisual. En este punto se subraya que la calificación de los videos no constituyó la valoración de los objetivos y resultados del Proyecto. La primera se realizó como lo establecen sus programaciones docentes, mientras que la segunda precisó realizar debates grupales y una encuesta para los alumnos de las dos instituciones.

En la siguiente sección se expone la discusión de los logros, limitaciones y resultados del Proyecto siguiendo la metodología socio-crítica. Es decir, para identificar sus metas se contrastaron e interpretaron los resultados de los cuestionarios con las respuestas espontáneas surgidas de dos debates dirigidos (uno en la UC -43 participantes- y otro en la UAM- Xochimilco -26 participantes-) y que precisaron el uso de un guion previamente elaborado.[3]

Interpretación de los Resultados Del Proyecto

Como se ha manifestado, el texto considera que proceso de enseñanza-aprendizaje es un conjunto de manifestaciones culturales que tienden a la reproducción de las estructuras y de los valores sociales dominantes. Por ello, específicamente en aquel que promueva la formación en habilidades y destrezas de acceso y uso de TIC, es necesario observar que las programaciones docentes lo incluyan; ya que el desarrollo de prácticas mediadas por los recursos que estas tecnologías podrían (mediante trabajo continuado entre profesores y alumnos) lograr cambios y/o mejoras en las experiencias de enseñanza-aprendizaje. Esta sección se centra la interpretación de cinco aspectos que se considera permiten identificar la manera en que este aporta a la discusión sobre las posibilidades de los recursos educativos digitales para cambiar y/o mejorar algunas didácticas:

1. Desarrollo de contenidos educativos originales en formato digital.
2. Dotación de técnicas para elaborar recursos educativos digitales.
3. TIC como recursos didácticos.
4. Uso de TIC para promover cambios y/o mejoras educativas.
5. Uso de recursos TIC en futuras experiencias profesionales docentes.

En opinión de los estudiantes, el Proyecto permite reflexionar sobre la posibilidad de desarrollar nuevos y originales contenidos educativos con herramientas TIC. Manifiestan que, a pesar de la presencia de numerosas argumentaciones que reconocen la importancia de crear nuevas prácticas y metodologías con TIC en contextos escolarizados, la estructura del modelo de educación superior no facilita, en la práctica (y de forma generalizada) el uso significativo ni innovador de estas. Por ello, estas experiencias son útiles porque potencien reflexiones y permiten experimentar el proceso de elaboración de materiales educativos digitalizados.

En concreto, las percepciones de los alumnos permitieron reflexionar sobre las causas y los ritmos de los cambios planificados y dirigidos en las dinámicas escolares que no necesariamente responden a las reformas educativas, sino que resultan de una combinación de transformaciones culturales, económicas, sociológicas y generacionales que tienen lugar en los centros educativos y reflejan una lógica interna (López- Yáñez, 2010). El Gráfico 1 recoge las opiniones de los estudiantes que participaron en el proyecto sobre la meta primera del mismo.

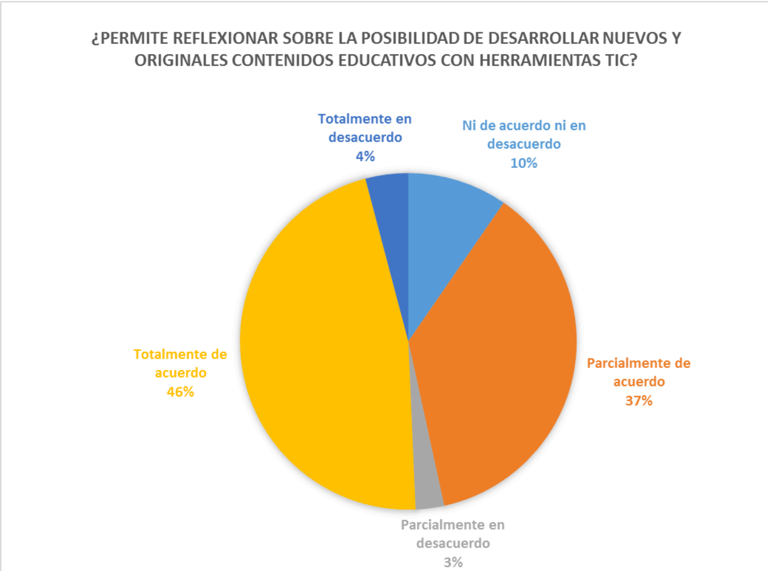

Figura 1. Desarrollo de contenidos educativos originales en formato digital
Fuente: Elaboración propia

Después, sobre la promoción de habilidades de los alumnos para la elaboración de contenidos digitales, los alumnos subrayaron las dificultades técnicas. Los de la UC manifestaron su escasa formación sobre el uso de los recursos software de libre acceso. Sobre las complicaciones organizativas y de gestión, todos los alumnos señalaron la gran cantidad de tiempo que exigió elaborar el producto. Finalmente, en cuanto a las dificultades didácticas, manifestaron conflictos en el uso de un lenguaje común entre dos contextos culturalmente diferentes entre sí. El Gráfico 2 refleja la opinión de los alumnos sobre la potencialidad del proyecto para dotarlos de destrezas y/o habilidades para desarrollar recursos educativos digitales.

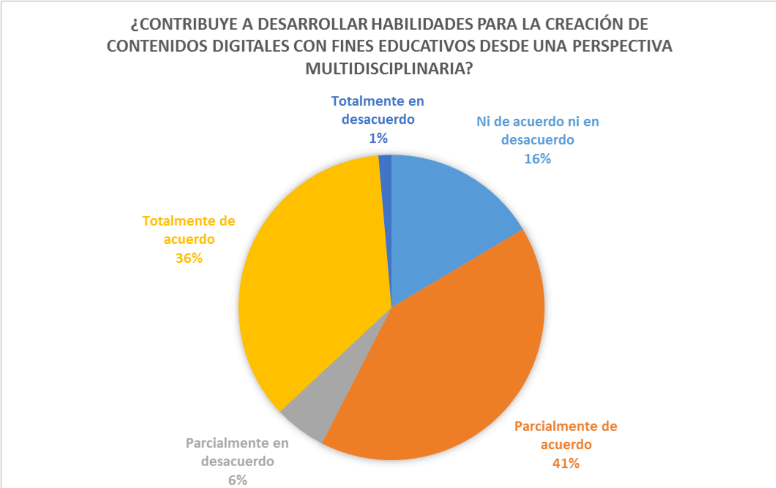

Figura 2. Dotación de técnicas para elaborar recursos educativos digitales
Fuente: elaboración propia

Respecto al uso de TIC en contextos educativos, los alumnos consideran que el proyecto fue una oportunidad para vincular sus conocimientos tecnológicos previos (unos adquiridos mediante el uso cotidiano de *gadgets*, por ejemplo y otros como parte de su formación universitaria) con temáticas puntuales del programa docente de los grados que cursan. El Gráfico 3 recoge la opinión de los participantes sobre el uso de videos como medios para difundir contenidos educativos nuevos y originales.

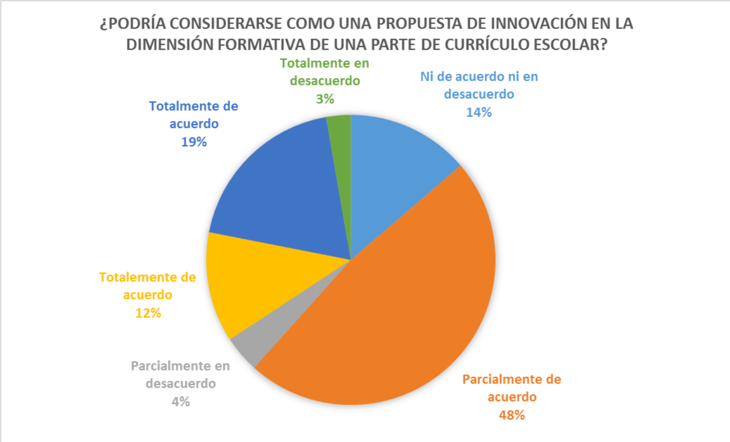

Figura 3. TIC como recursos didácticos
Fuente: elaboración propia

Sobre el potencial de las TIC para impulsar cambios y/o mejoras en las metodologías docentes, los alumnos consideran que el Proyecto promueve la reflexión sobre las innovaciones en contextos educativos; sin embargo, manifiestan escepticismo sobre la manera en que la elaboración de sus propias grabaciones audiovisuales podría incidir en la estructura del currículo escolar. Es de resaltar que los alumnos también reconocen que la actividad podría significarse como ensayo de cambio y/o mejora educativa a largo plazo.

Siguiendo a López-Yáñez (2010), sobre este punto se reflexiona sobre los mecanismos y las dinámicas sociales que subyacen en las prácticas de innovación educativa. Es decir, es reconoce la importancia de observar las tramas sociales e ideológicas detrás de los procesos de innovación y que serán las que faciliten su perduración en tiempos prologados. Para este autor la sostenibilidad de proyectos educativos innovadores se vincula directamente con la presencia de condiciones organizativas (sobre todo las informales) caracterizadas por la apropiación y valoración positiva de significados que subyacen en los cambios y/o mejoras, por parte de quienes los llevan a cabo.

El Gráfico 4 relata la opinión de los alumnos de la UC y de la UAM–Xochimilco sobre la cuantía de esta actividad como propulsora de innovaciones educativas y, luego, de su futura incorporación a las programaciones docentes.

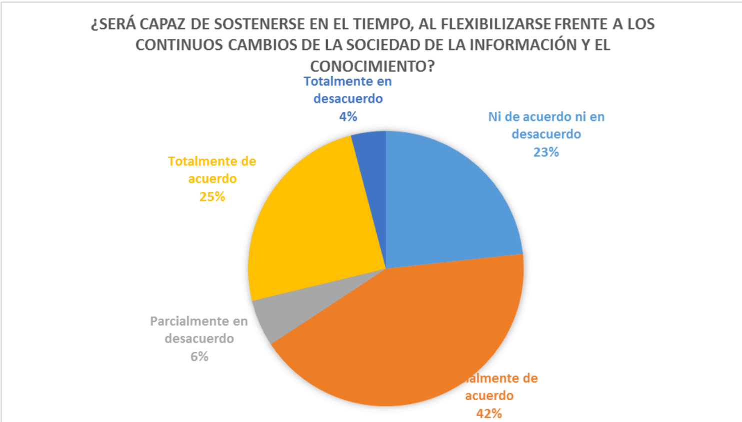

Figura 4. Uso de TIC para impulsar cambios y/o mejoras educativas
Fuente: elaboración propia

Finalmente, sobre la reproducción de este tipo de actividades en futuros contextos laborales, los alumnos manifestaron su disposición a probar replicarlos, siempre que se cuente con recursos tecnológicos suficientes. Los alumnos de la UAM- Xochimilco señalaron que para lograr un intercambio significativo entre los protagonistas del proceso de enseñanza-aprendizaje, será fundamental considerar que el lenguaje audiovisual (independientemente del contenido). Es decir, se han de considerar dos cuestiones fundamentales: a) las particularidades de los códigos comunicativos multimedia y; b) los posibles contextos de enunciación. De esto se deduce que los recursos educativos digitales han de ser flexibles en cuanto que permitirán la modificación de su contenido de acuerdo a las necesidades específicas de los diferentes contextos educativos. El Gráfico 5 expone la opinión de los alumnos sobre la posibilidad de usar documentos digitales con fines educativos de elaboración propia como recursos complementarios y facilitadores del proceso de enseñanza aprendizaje.

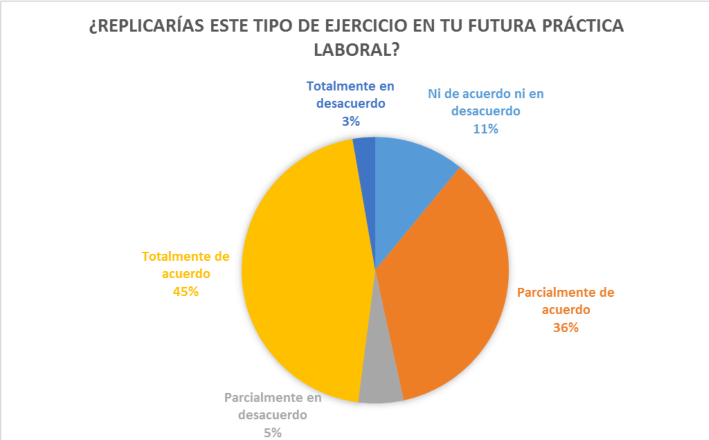

Figura 5. Uso de recursos TIC en futuras experiencias profesionales docentes
Fuente: elaboración propia

Una contribución de este Proyecto es que, en opinión de los alumnos, su uso podría favorecer cambios y/o mejoras en las metodologías educativas y en la formación de futuros profesores. Sin embargo, es importante destacar, como lo hace González Mariño (2008, p. 7):

> No es sólo la inclusión de TIC en la enseñanza lo que le da el carácter innovador, la innovación educativa debe verse desde una perspectiva mucho más amplia e integral, donde la combinación de los medios tecnológicos adecuados y un diseño didáctico basado en las necesidades específicas de aprendizaje de acuerdo al contexto.

En el contexto de la sociedad de la información y el conocimiento, la formación de profesores ha de responder a las nuevas configuraciones de la tecnologización de las interacciones sociales. En cuanto la alfabetización digital, se considera que será muy importante reflexionar sobre las repercusiones de estas transformaciones tanto en el campo de la investigación como en la práctica curricular. Es decir, se entiende como lo hace Barrón e Ysunza (2003) que la discusión de la finalidad educativa de promover la creación de materiales didácticos digitales ha de incluir el debate sobre la conceptualización y las estrategias para la formulación del perfil profesional, lo que llevará a identifica un campo de problemas que tocan la pertinencia actual de las estructuras curriculares.

Reflexiones Finales

Los actuales entornos socio-educativos exigen potenciar el desarrollo de habilidades avanzadas de pensamiento crítico para poder comprender y usar la información transmitida por las TIC. En contextos de educación superior, las programaciones docentes se están transformando para intentar dar cabida a enfoques que promuevan el uso de herramientas tecnológicas; sin embargo, estas propuestas por sí solas, no representan cambios y/o mejoras en las prácticas docentes. En Europa, diferentes estudios sobre innovación educativa han demostrado que la promoción de cambios y/o mejoras educativas con TIC en los currículos escolares no conlleva su ejecución extendida e igualitaria. Para Tondeur, Van Braak y Valcke (2007, p.28) no necesariamente hay coherencia entre las sugerencias del texto curricular y las dinámicas escolares, porque en la práctica, el uso de TIC implica la conjunción de otros factores, como por ejemplo la formación de los recursos humanos y la presencia de recursos tecnológicos, pero sobre todo de la participación activa tanto de profesores como de alumnos. En otras palabras, el uso de TIC en contextos educativos puede servir para innovar en aspectos del proceso de enseñanza-aprendizaje; sin embargo la observación del Proyecto manifestó:

En primer lugar, la propuesta de elaborar recursos digitales como materiales didácticos no es una actividad nueva. Sin embargo, el Proyecto señaló que los cambios y/o mejoras con TIC en las dinámicas escolares resultarán luego de conocer y apropiar de las potencialidades de estos recursos como medios para transmitir determinados contenidos. Por ello han de resignificarse como herramientas útiles para la expresión de otros lenguajes, otras perspectivas académicas y otras culturas; así como para la promoción de relaciones igualitarias entre alumnos y profesores. Es decir, los actuales contextos educativos digitalizados exigen la formación de usuarios capaces de comprender un determinado código simbólico (o lenguaje significativo) para interactuar en ellos (Riffo, 2015). En palabras de Tello y Aguaded (2009, p. 41), “la incorporación de las TIC supone mucho más que dotar a los centros de equipamiento e infraestructuras: además, es necesario favorecer y desarrollar la capacidad de reflexionar sobre la información recibida". Por si fuera poco, la introducción de las TIC en las dinámicas escolares (ya no en el currículo escolar) exige contar con políticas que impulsen la alfabetización de las tecnologías digitales. Más allá del manejo del hardware y del software, será importante puntualizar las reflexiones académicas en torno a los códigos de los lenguajes digitalizados y las formas comunicativas mediados por TIC en contextos educativos.

En segundo lugar, la inclusión de prácticas con TIC en formaciones de grado es insuficiente para cambiar y/o mejorar metodologías docentes caracterizadas por la reproducción de esquemas en los que el proceso de enseñanza- aprendizaje privilegia el rol del profesor como principal transmisor de la información. Específicamente, actividades como las proyecto podrían significar alguna innovación en medida en que se discutan las limitaciones y las potencialidades de las TIC como canales para las manifestaciones culturales que se producen y reproducen en entornos escolarizados. Siguiendo a Tello y Aguaded (2009, p. 45) se afirma que la labor del profesor consiste en "hacer que el alumnado se permita el mismo la posibilidad de buscar su propio bagaje cognitivo y relacional, en un mundo plural".

Partiendo del reconocimiento de las diferencia socio-culturales, políticos y económicos que caracterizan los contextos escolares observados se señala que la integración de TIC como herramientas simbólicas con capacidad de producir discursos alternativos al dominante, trae consigo exigencias relacionadas con la transformación de las representaciones socio-culturales de quienes dan vida a las instituciones y desarrollan los modelos de educación superior, de manera que a futuro en el currículo escolar de educación superior sea posible introducir debates teóricos y ejercicios prácticos que promuevan la observación de las TIC como fenómenos culturales, además contemplar contenidos que apunten al manejo tanto del software como del hardware.

Finalmente, se señala las actividades que contempló el Proyecto no encuentran expresión en los documentos curriculares oficiales. En las programaciones docentes de educación superior si bien se resalta la importancia de formar en el uso de recursos TIC, es poco frecuente encontrar manifestaciones claras sobre la importancia de promover el análisis y la interpretación de la información digitalizada para transformarla en conocimientos que permitirán la interpretación de contextos análogos o mediados por TIC. Su incorporación exigiría, entre otros, implantar acciones que lleven a la investigación teórica o la observación sistematizada de proyectos que promuevan debates académicos sobre la alfabetización digital, la cultura mediática, los modelos didácticos con TIC, el trabajo colaborativo y multidisciplinario entre diferentes instituciones. En otras palabras, la modificación de la estructura de los programas docentes sobre el uso de TIC en contextos escolarizados precisa llevar a cabo pequeños cambios en las dinámicas de los centros educativos.

Notas

[1] Sociedad, Cultura y Educación es una asignatura perteneciente al área de Sociología del Departamento de Educación de la Universidad de Cantabria. Se imparte bajo la modalidad de presencial en el primer cuatrimestre de los grados de Magisterio en Educación Infantil y Magisterio en Educación Primaria. Constituye 6 créditos académicos ECTS. Más información en: web.unican.es.

[2] El área de Alfabetización Mediática y Cultura Digital se define como el espacio de aprendizaje de las herramientas y metodologías para que los alumnos identifiquen las problemáticas de la Sociedad de la Información. Más información en: http://dcsh.xoc.uam.mx/liccom/.

[3] Respecto a los cuestionarios y los debates se señalan algunas precisiones: El cuestionario incluyó diez preguntas cerradas, que recogió datos como edad, sexo, carrera y lugar de residencia (España y México), pero en el texto se manifiestan y discuten los resultados que se relacionan directamente con la experiencia de creación de recursos digitales como materiales didácticos. Luego, se usaron todos los cuestionarios porque éstos fueron cumplimentados por la totalidad de los alumnos que participaron del proyecto, probablemente debido a que se realizaron en presencia del docente-investigador y la actividad formaba parte de la evaluación de una asignatura obligatoria.

Sobre los debates grupales, se destaca se realizaron únicamente con los alumnos que participaron en el proyecto en su segunda edición y con el objetivo de contrastar la información recogida a través de los cuestionarios.

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Educación para una Ciudadanía

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Reviews

Jiménez Gámez, R.A. & Goenechea Permisán, C. (2014). *Educación para una Ciudadanía*. Madrid. Síntesis

El trabajo de Rafael Ángel Jiménez y Cristina Goenchea es el resultado de la amplia experiencia de los autores como docentes en aulas cada vez más diversas, dada la nueva composición social y los flujos migratorios. En este sentido, los autores ponen en el centro del debate educativo el aula multicultural en un mundo globalizado. Para Jiménez y Goenchea es precisamente la educación y los agentes educativos los que pueden dar respuesta a la gestión de dicha multiculturalidad, promoviendo una ciudadanía activa e intercultural.

La primera parte del libro, *La sociedad multicultural. Globalización e inmigración. La construcción de la ciudadanía intercultural*, los autores realizan un análisis de los cambios sociales derivados de los últimos movimientos migratorios, y de cómo, desde las distintas esferas (educativa, política, económica y/o social) se intenta dar respuesta a esta multiculturalidad y los problemas que puede plantear si no se gestiona de manera adecuada. En este sentido el trabajo parte de una reflexión teórica sobre las dinámicas relacionales entre la sociedad global, neoliberal, y democrática y dicha multiculturalidad. A continuación se centra en el caso español, paradigmático como país receptor de inmigrantes en los últimos años. Finalmente, los autores apuestan por una ciudadanía activa, democrática e intercultural como principal respuesta ante la diversidad social y cultural, y las condiciones que deben darse para ello.

La segunda parte del trabajo de Jiménez y Goenchea, *La acción educativa para la ciudadanía intercultural,* pone el acento precisamente en la educación, desde la evolución histórica del concepto y la investigación sobre el mismo en nuestro país, la reflexión sobre la acción intercultural compensatoria, y las propuestas para el currículum educativo para lograr una ciudadanía eficaz interculturalmente. Es precisamente en este punto donde reside el valor más importante de este trabajo. Los autores abogan de manera decidida por el relevante papel de la educación en un mundo donde los flujos migratorios, el fenómeno de los refugiados y la presencia de minorías étnicas hacen esencial la acción institucional y social en favor de la inclusión de estos grupos poblacionales. Así, a través de la reflexión sobre la formación en la diversidad (contenidos, metodologías y evaluación) y las experiencias más significativas en este sentido, Rafael Ángel Jiménez y Cristina Goenchea, proponen la promoción de una sociedad inclusiva a través de la promoción de la competencia intercultural en las aulas.

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