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EDUCATIONAL REFORM AND THE CONTRADICTORY DISCOURSES OF EVALUATION

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Abstract Educational reform in New Zealand has entailed major changes in the discourses of educational policy, including the discourses of evaluation. Assurance auditing and school effectiveness reviews are forms of educational evaluation that have emerged at a time of major structural change within both society and education. These forms of evaluation are manifestations of the ideologies of neo-liberalism and economic rationalism that have informed the wider restructuring. The expansive Keynesian state has been transformed into a minimal contractualist state, and the autonomy of bureaucrats and professionals (including teachers) is no longer taken for granted. Within this context, evaluation has been reconstituted into a new set of institutional practices embodying contradictory discourses of market-liberalism and bureaucratic managerialism. This paper critiques these emergent forms of evaluation and considers their political and ethical implications.

Introduction

In his recent book on ideology, Terry Eagleton (1991: 193) suggests that within the linguistic revolution of the twentieth century 'we have shifted from thinking of words in terms of concepts to thinking of concepts in terms of words'. To put it another way, what we have discovered is that language is much more than a medium for transmitting ideas or an instrument for unveiling consciousness; it is a form of social practice. Thus,

Instead of holding in empiricist vein that words 'stand for' concepts, we now tend to see 'having a concept' as the capacity to use words in particular ways. (Eagleton, 1991: 193-4)

When we examine the ways in which language is used, that is when we think of it as discourse, we can begin to recognise its importance within much broader processes of social change. Moreover, as theorists such as Foucault have shown, the analysis of discourse leads us towards a deeper understanding of how power is exercised and how knowledge is constructed in advanced technological societies.

In considering the extensive educational reforms that have occurred in recent years, it is now clear that what is changing within the context of education goes much further than the restructuring of administration or the implementation of

new policies for curriculum or assessment. There are changes occurring at a much deeper level within the very discourses that shape our understanding of education as a field of social practice. Although they are manifested in particular linguistic forms and discursive practices, these changes also must be located within the broader political and economic movement which provides their context. It is a movement that began in New Zealand in the mid 1980s with the collapse of the Keynesian welfare state and the ascendancy of a form of neo-liberal monetarism.

During a period of major structural change within both society and education, the expansive Keynesian state has been transformed into a minimal contractualist state, and the autonomy of bureaucrats and professionals (including teachers) is no longer taken for granted. New forms of accountability and surveillance have emerged as manifestations of the economic rationalism that has informed government policy-making. Within this context, educational evaluation has been reconstituted into a new set of institutional practices embodying contradictory discourses of professionalism and technocratic reductionism.

This paper begins with a brief outline of Norman Fairclough's framework for discourse analysis and suggests that it has particular relevance for the critical examination of changing discursive practices. This is followed by a description of the political context in which economic rationalism has become the dominant force behind most of the administrative structures of the state. Its effects upon the discourse of educational evaluation are then shown with reference to the changing policies and practices of the Education Review Office from the time of its inception in 1989. This office, which replaced the former inspectorate, was established within the recent reforms to operate independently of both the Ministry of Education and all educational institutions. It is argued that the role and functions of this agency of the state have moved towards an economic model of evaluation and accountability that is fundamentally inappropriate to educational institutions. It is argued, moreover, that such a model endorses a set of evaluation practices that are essentially technocratic, producing structures of managerial control rather than qualitative improvements in teaching and learning. Finally, it is argued that the restoration of democratic and professionally defensible evaluation practices must be preceded by a discursive struggle in which the ideological forces of economic rationalism are defeated.

A Framework for Discourse Analysis

Within a technical-empiricist conception of the policy process, official documents and texts are interpreted simply as expressions of political purpose, as statements of intent produced by policy makers and administrators to enunciate the policies that they intend to follow. This view of policy texts, however, entails

Few would now dispute Ball's assertion that 'we need to appreciate the way in which policy ensembles, collections of related policies, exercise power through a *production* of 'truth' and 'knowledge', as discourses' (Ball, 1993: 14). Used in this way, the term *discourse* refers both to the language of texts *and* to the social practices which govern such use. In this sense, *discourse* refers not only to the meaning of language, but also to the real effects of language-use, to the materiality of language. A discourse is a domain of language-use and therefore a domain of social practice.

The notion that educational policies and their related documents can be interrogated by the theories and methods of discourse analysis is now accepted and is giving rise to a small but growing body of work (Ball, 1990; Bowe *et al.*, 1992; Codd, 1992). Debates are beginning to emerge about the relative status of policy as text and as discourse (Ball, 1993; Henry, 1993; Troyna, 1994) and about the contribution of discourse analysis to theories of the state (Hatcher & Troyna, 1994). These discussions indicate that the analysis and critique of discourse is

...in seeing language as discourse and as social practice, one is committing oneself not just to analysing texts, nor just to analysing processes of production and interpretation, but to analysing the relationship between texts, processes, and their social conditions, both the immediate conditions of the situational context and the more remote conditions of institutional and social structures. (Fairclough, 1989: 26)

To this end, Fairclough posits a three-dimensional conception of discourse, in which he seeks to integrate, or triangulate, three forms of analysis: analysis of *text*; analysis of *discursive practices*; and, analysis of *social practices* (see Figure 1).

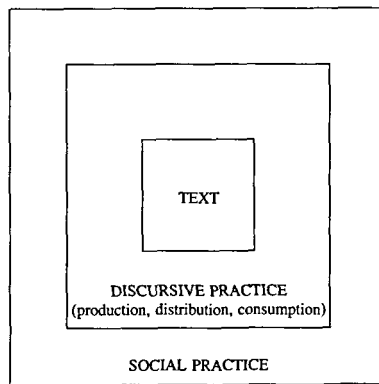


Figure 1 Three-dimensional conception of discourse (Fairclough, 1992: 73)

Within Fairclough's framework, texts are specific instances of written or spoken language. They are one of the dimensions of a discursive event. Another dimension entails being an instance of social (political, ideological, etc.) practice. The analysis of discourse as text focuses upon linguistic processes, whereas the analysis of discourse 'as a piece of discursive practice' goes beyond the linguistic features of the text, and

...focuses upon processes of text production, distribution and consumption. All of these processes are social and require reference to the particular economic, political and institutional settings within which discourse is generated. (Fairclough, 1992: 71)

This framework is useful in analysing the discourses of educational policy. It provides, in particular, a basis for the recognition of different *discourse types* and explains why language is politically important in struggles over education policy. As Fairclough points out,

The struggle over language can manifest itself as a struggle between ideologically diverse *discourse types*. (Fairclough, 1989: 90)

What is at stake in such struggles is which discourse type is to be dominant within the social domain of education, and therefore which practices are to be ideologically maintained or strengthened.

In a recent paper, Stephen Ball comments that:

...we need to recognise and analyse the existence of 'dominant' discourses — like neo-liberalism and management theory — within social policy. (Ball, 1993: 15)

Such an assignment is particularly apposite within the current context of education policy in New Zealand. Both neo-liberalism and management theory are the main ideological strands in what can be referred to as the discourses of economic rationalism. We turn now to consider the social and political context in which economic rationalism has become a dominant ideological force behind the discourses of the state, including those to be found in official texts concerned with educational evaluation and accountability.

The Advance of Economic Rationalism

In New Zealand, the rise of economic rationalism coincided with the election of the fourth Labour Government on 14 July 1984. From this time Treasury

the allocation of resources. This 'new' market-liberalism is no more than a revival of classical liberalism with its doctrines of individual freedom, public choice and minimal government (Barry, 1986).

From 1984 on this was to become the dominant ideology guiding state policies in New Zealand. The proposition that a marketplace free of government intervention would work to the benefit of all, and the related proposition that excessive government spending was the prime cause of the economic crisis, came to be held as self-evident facts rather than articles of faith. In their 1987 Brief to the Incoming Government, entitled *Government Management*, New Zealand Treasury officials produced another substantial policy document based almost entirely upon the doctrines of economic rationalism. In addition to neo-liberalism, this text could be seen to be strongly influenced by a particular brand of

finite contract. Such contracting is a direct application of agency theory or transaction-cost economics (Williamson, 1985; Perrow, 1986) which has also been a major discursive influence on government policy texts since 1984.

Yet another major influence on government policies has come from the doctrines of what has been called the New Public Management. This neo-managerialism seeks to increase the efficiency of the state by bringing all its agencies under hierarchical management structures and forms of accountability that are believed to work successfully in the private sector. Thus, in *Economic Management* there was a section on 'Management of the Public Service' which contained the following statement:

An effective management system...requires the following main attributes — clear objectives, appropriate incentives for performance, clear accountability, delegation of authority and responsibility to the most appropriate level. (Treasury, 1984: 287)

The document then described what it called 'the ideal management system' for organisations operating within a competitive market. If applied in the public

The legitimating rhetoric proclaimed that these reforms would produce greater flexibility and responsiveness but in reality they have produced a structure in which managerial decisions are more effectively controlled. There are clear parallels here with the 1988 British Education Act which has been described as a structural change from corporatism to a new form of contractualism. It represents a fundamental transformation of the discourses of educational administration and an extension into the domain of education policy of the same logic that informs market liberalism and economic rationalism. The Report of the Taskforce to Review Educational Administration (Picot Report) provided legitimation for such a policy in the shape of a white paper entitled *Tomorrow's Schools* (Minister of Education, 1988).

The theme of accountability is addressed in the Picot Report in contradictory ways. In a section concerned with the role of the principal there is an unequivocal statement about research evidence on successful educational leadership that emphasises 'the collaborative relationship between principal and staff', proposing that both 'participate regularly in reviewing the quality of the institution's educational performance' and commenting that 'the way decisions are arrived at is just as important in the life of an institution as the decisions themselves' (Taskforce, 1988: 51–2). The new administrative structures, however, were not conducive to processes of democratic participation and shared responsibility. As board members, principals were to be given managerial responsibilities for staff appraisal and for the determination of incentives, rewards and sanctions.

Within its proposed new structures, the Picot Report defines accountability in terms of external monitoring, measurement and control. It states that:

Genuine accountability involves three major elements:

- clear and specific aims and objectives, expressed as outcomes;
- control over the resources available to achieve those objectives;
- monitoring by an outside agency of how well those objectives are met. (Taskforce, 1988: 60)

The proposed outside agency was to be called a Review and Audit Agency and it is described in *Tomorrow's Schools* as follows:

An independent body — the Review and Audit Agency — will be established to ensure that institutions are accountable for the government funds they spend and for meeting the objectives set out in their charter. (Minister of Education, 1988: 20)

When it was established in October 1989, this agency was re-named the Education Review Office (ERO). Most of the staff appointed to this Office had extensive teaching experience and many had held senior positions in schools or in the Inspectorate of the former Department of Education. Within the first few months of its operation, the Education Review Office sought to develop procedures for the review of learning institutions that would be consistent with educational principles.

In accordance with its designated functions, the Office began to plan and trial review procedures. A Corporate Plan (ERO, 1989) was published and a commitment was made to eight guiding principles for reviews. These were as follows:

- A review must lead to improved education for all learners.
- A review must build on the strengths of an institution.
- A review must centre on charter objectives, reflect the nature of the institution and be culturally appropriate.
- A review will be concerned with changing practices leading to improved effectiveness.
- A review will be consultative and within the time available be cooperatively planned with shared understanding of the purpose.
- A review will focus on the institution's own self-evaluation.
- A report should be balanced and written to communicate with all audiences.
- People on review teams will come from a range of disciplines but must have credibility within the sector being reviewed. (ERO, 1990)

These principles, together with the first Corporate Plan of ERO, are couched in a discourse that is consistent with and supportive of both the professionalism of teachers and the educational mission of learning institutions. The situation.

This is the language of a compliance culture, strongly influenced by public choice theory. *Effectiveness reviews* are defined as:

direct reviews of educational institutions to evaluate the contribution made to student achievement, in terms of both standards and progress. by the

within the latter it is the reflective practitioner. This term is now widely accepted by teacher educators who have been influenced over the past decade by the writings of Donald Schon (1983; 1987). Schon's model of the reflective practitioner, based as it is on Dewey's theory of enquiry, seeks to integrate theory and practice through a process of critical self-evaluation and practical deliberation. It has strong links to Eric Hoyle's (1974) notion of the *extended* professional, Lawrence Stenhouse's (1975) notion of the 'teacher as researcher' and the models of action research promoted by Carr & Kemmis (1986) and by John Elliott (1991). All those ideas feed into the professional-contextualist discourse of evaluation.

changes within the language of policy texts are particular manifestations of deeper structural changes occurring at the level of discursive practice and, more pervasively, at the level of social practice. These structural changes have resulted

Educators in New Zealand in the 1990s must win back the high ground of educational discourse. If schools are to become democratic, open and self-reflective communities, the current forces of managerialism and technocratic reductionism in educational evaluation must be resisted vigorously. Teachers are at the front-line of that resistance. It is to be hoped that they are prepared for the challenge.

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