

Teachers as community leaders: the potential impact of teacher migration on education for all and millennium development goals

Amanda Sives, W. John Morgan and Simon Appleton, University of Nottingham

Introduction

In 1990, at Jomtien, Thailand, the *World Conference on Education for All*, the international community recognized education as the key to economic growth and to poverty elimination. As Don McKinnon, Secretary-General of the Commonwealth, said at the 15th Conference of Commonwealth Education Ministers (CCEM) held at Edinburgh in October 2003: 'If we want to build stronger, wealthier communities, if we want to combat illness and poverty, if we want fairer and more equal societies, then education is the only way forward.' (McKinnon 2003) Considerable donor funding is allocated for this purpose and ambitious targets have been set for universal primary education by 2015.

As Lalage Bown has reminded us 'Scholarship is commonwealth in several senses. The knowledge and understanding which derives from scholarship both helps in the conservation of values held in common and is the basis of economic change or development. It is therefore quite literally the wealth of any community, small or large.' This does not mean however that access to the world's store of knowledge, or the capacity to generate it, is shared equally. If anything, the dramatic developments in information technology of recent decades have deepened inequalities, as the poorer countries do not command the technical skills, equipment or resources to benefit from them. As Bown continued, such a situation is of serious concern to the Commonwealth since '...it is a partnership of rich and poor countries, a coalition of North and South which will experience increasing tension if these gaps are not bridged' (Bown 1994:4). In recognition of this, the World Education Forum, held in Dakar, Senegal in April 2000, emphasised that, while the strategy laid down at Jomtien a decade earlier was valid in its aims and objectives, it was necessary for progress towards 'Education for All' to be accelerated. This was essential if globally agreed targets for poverty reduction were to be achieved and the widening gaps of wealth, both between countries and within societies were to be narrowed.

Education, economic growth and poverty reduction

Education is likely to affect economic growth in two main ways. First, education is likely to enhance an individual's productivity at work. The near universal link between individual education and earnings is evidence of such a link. For example, research on manufacturing firms in Ghana has shown that the education of workers is associated with productivity in much the same way as it is associated with higher earnings (Jones 2001). Differences in investment in 'human capital' – of which, education is one form - are now thought to be a major factor, alongside differences in accumulation of physical capital, in explaining cross-country differences in growth and income (Mankiw, Romer and Weil 1992). Secondly, education is likely to promote the development and adoption of technology in the economy as a whole. This is crucial since technological progress is regarded as the primary determinant of long run economic growth. Recent episodes of high economic growth, for example in East Asia, have arguably rested on the availability of a stock of educated workers and an expansion of education to meet the increasing needs of the economy (see Young 1995, for East Asia, Gemmill 1996, for the more general growth evidence). However, it is important to recognise that education alone can not be relied upon to generate growth – Africa has suffered from slow growth despite educational expansion being one of the clearest fruits of 'Uhuru' (independence). Other preconditions for growth must also be present, but an educated workforce is an important foundation for sustained growth.

Although not true in every case, the poor tend on average to benefit from their country's economic growth just like other residents (Dollar and Kray 2000). However, growth driven by educational expansion may be particularly pro-poor. In developing countries, labour is the main asset of the poor and so increasing the productivity of labour brings them direct rewards. Moreover, further educational expansion mainly benefits poorer households. Children without primary schooling are likely to be in the most economically disadvantaged households and indeed may be among the more disadvantaged members of such households (e.g. girls in many cultures). Increasing access to schooling is also likely to reduce inter-generational inequalities in education, as seen, for example, in the comparison of the Kenyan and Tanzanian 'natural experiment' in the 1970s (Knight and Sabot 1990). In addition, educational expansion is likely to reduce the wage premiums enjoyed by the more educated workers and thus lead to a progressive 'wage compression', as witnessed during the high growth episodes of Western Europe, 1950-73 and East Asia after 1960. These issues have particular relevance to Africa, where economic decline since 1980 prevented the continent matching the progress in education made by Asia. The wave of universal primary education (UPE) initiatives in the last ten years in countries such as Uganda, Malawi and Tanzania offers some prospect of improvement, although such initiatives brings their own set of challenges for such resource constrained countries.

Educational leadership and the teacher as a community model

In pursuit of these millennium objectives, governments everywhere have embarked on substantial programs of reform in an attempt to develop more effective school systems and raise levels of student learning and achievement (Hopkins and Levin 2000). The nature of reform varies from country to country because of special historical, cultural, institutional and political factors. The quality of educational leadership is for good reason regarded as central to realising this vision. Barber explains it thus: 'The decisive factor in whether or not we are successful will be-at government level, at intermediate and local level, but above all at school level. We need leaders who understand the vision and the goals, who understand the meaning of leadership in the early 21st Century and who have the skills not only to improve schools but to transform them (Barber and Sebba 1999:183). During the past decade the debate over educational leadership has been dominated by a contrast between the (so-called) 'transactional' and 'transformational' approaches. 'Transactional' models are usually found in systems where strong central control has been retained, while where de-centralisation has been most evident considerable interest in 'transformational' models has emerged. It has been widely argued that complex and dynamic changes, such as the 'cultural' changes that are required for sustained school improvement, are more likely to occur as a result of transformational leadership (Burns 1978, Caldwell 1999, Leithwood and Jantzi 1990). This style of leadership focuses on the people involved, their relationships, and requires an approach that seeks to transform feelings, attitudes and beliefs. This is recognition of the role of the school and of the teacher in the communities that they serve. Schools are seen too often as the affair of the state, of the professionals who work within them and, at best, of the parents of the children who attend them. This fails to recognise the teacher as a model in the Gramscian sense of 'organic intellectual' (Borg et al 2002) That is not merely as a guide to the formal curriculum, but also as a 'perpetual persuader' towards the goals of community development The much discussed work of Paulo Freire is also relevant here (Roberts 2000).

Educational leadership in this broader sense is important, not only to the cognitive development of the school-child in a formal setting, but to the development of all citizens, young and old, and to community and national development. This is recognition also of the values and practice of lifelong learning as means towards the simultaneous reduction of poverty reduction and the enhancement of civil society. As Oduaran points out in a recent article, while lifelong learning requires the development of both formal and non-formal education, in the developing world and in Africa in particular the latter has 'endured substantial neglect and under-funding for too long', a problem aggravated by the

indiscriminate effects of globalization (Oduaran 2003:20). A policy of lifelong learning has the advantage of reducing the artificial boundaries between the formal and the non-formal. Instead a human development model is offered that recognises the right of all citizens, young and old, male and female to the opportunities of education and the possibilities it offers for a better life. As Adams has suggested, 'formal education cannot eliminate problems associated with social and economic change, nor even fully prepare the population to cope with these changes.' However, an integrated, effective and equitable system of formal and non-formal education can reduce inequalities, develop shared values, bring home and school closer together and increase the participation of the community in decisions about education policy and practice.

Such issues and possibilities are not, of course, exclusive to the countries of the developing world (Morgan and Hopkins 2000). However, in the developed world it can be argued that the formalisation and bureaucratisation of education has effectively choked off the possibility for teachers to grasp this role. Under the illusion of professional status, they have become instruments of a specific economic and social agenda. This is not to underestimate their individual contribution, integrity or motivation, but to question the extent to which they are rooted in the community they aspire to serve and their actual capacity to be broader social models, as well as instrumental instructors. In the developing world the social role of the teacher is more starkly fundamental. This was recognised both at Jomtien and at Dakar. Teachers in the developing world, paradoxically because of the massive problems such societies face, remain essential to the achievement of development goals. Poverty of a crippling kind remains the key problem. The breaking of this pattern depends on sufficient numbers of well-trained, well-motivated teachers infused by a sense of worth to the communities that they serve. Yet, as the World Education Forum at Dakar pointed out, the situation of teachers in the developing world in particular, in terms of training, salary, career development and status, has seen little improvement since the Jomtien conference of 1990. Talented teachers, essential to educational development, both of the formal and of the non-formal kind, are leaving for better paid jobs, both outside education and, in a significant number of cases, within education but in other more developed countries.

Teacher Recruitment, Motivation and Retention

There has been widespread concern about the recruitment of talented persons to teaching and about teachers' low motivation, high absenteeism and tendency to leave for other work. This has led to an international search for appropriate teacher incentives. Chapman and Adams (2002:22) cite examples of frequently suggested incentives, such as merit pay with a significant proportion of a teacher's salary based on assessment by supervisors, salary premiums to teachers of shortage subjects such as mathematics and science or to teachers prepared to work in unpopular locations. As an OECD report on the management of teachers in southern Africa pointed out, optimal use requires that teachers 'be deployed in an equitable and appropriate manner among the different areas and schools of the country.' Also, that posts- especially those with special responsibilities- be filled with appropriate staff' (the latter a euphemism for trained and qualified teachers) (Goettelmann-Duret and Hogan, 1998:21). There are, of course, other factors, which affect teachers' well being, such as housing benefits and food and clothing allowances. Chapman and Adams (2002:23) also cite attempts to raise self-esteem, such as the practice in socialist Vietnam of awarding honourable titles such as 'people's teacher' or 'teacher emeritus' to teachers who have contributed significantly to schools in disadvantaged communities. This is, of course, the continuation of a well-known soviet practice that has the form if not necessarily the content and effect of Gramsci's concept of 'organic intellectuals' referred to earlier (Morgan 2003). However, the effectiveness of such incentives is difficult to evaluate because of specific national and organizational contexts. Research carried out by the OECD a decade ago suggested that what kept teachers in practice without adequate compensation or recognition was a combination of tenacious commitment to helping others learn and support from colleagues at the workplace (Chapman and Adams 2002:23, OECD 1994). This suggests that a clearly identifiable role

and status within both the school and the community is crucial to teachers' self-esteem and effectiveness as educators. Teachers and schools are part of the social and cultural infrastructure of all societies, but are particularly essential in developing countries.

However, in addition to the obstacles mentioned earlier, such infrastructure may also be damaged and the goals of Jomtien and Dakar prevented by an under-emphasized aspect of globalization. This is the significant international flow of trained teachers. There is a gap in knowledge of these movements and their implications for educational objectives. In the worst case, these movements may undermine the education sectors in developing countries through a 'brain drain' that allows developed countries to free ride on the investments in training made by developing countries. This was a concern raised by Caribbean Ministers of Education at a retreat in Barbados in July 2002. The decision of the meeting, the Savannah Accord, called for more research to be undertaken on the issue. Consequently, the Commonwealth Secretariat published a short report, together with a copy of the Accord, in September 2003 (Ochs 2003). It provided useful figures on recruitment of teachers and the experiences of overseas teachers working in the UK. This led, at the 15th Conference of Commonwealth Education Ministers (CCEM,) at Edinburgh in September 2003 to the establishment of a Commonwealth working group to examine the issue on behalf of ministers and the drafting of a protocol.

The aim of the protocol, similar to the code of conduct for health workers, is to ensure that the process of teacher recruitment between Commonwealth countries occurs in a manner that is beneficial to all parties concerned. Source countries want to be informed when recruiters are planning a recruitment exercise, they prefer that recruitment does not disrupt their school year and that, where possible and feasible, bilateral agreements are signed. Recruiting countries would like to ensure that their recruitment process operates efficiently in conjunction with the source countries. It is hoped that the protocol will act as a guide for all those involved in the recruitment process and will assist in the development of best practice. One of the other aims is to develop a system of data collection which will ensure that Commonwealth countries have a clearer idea of how many teachers are migrating, where they are coming from and whether they are returning home. This is very important in determining the impact of teacher migration on both recruiting and source countries.

The issue has also attracted the interest of the United Kingdom's Department for International Development, which was concerned about the possible effect on its strategy towards capacity building and poverty reduction, as well as about ethical issues involved in open teacher recruitment. In October 2003 the Department commissioned the Centre for Comparative Education Research and the School of Economics, University of Nottingham to undertake research based on case studies. The project, which is still underway, seeks to contribute to the policy debate on teacher recruitment and retention within the Commonwealth through the analysis of the experiences of four Commonwealth countries: South Africa, Jamaica (as 'sending' countries), the UK and Botswana (as 'receiving' countries). The project has also recruited research partners in the Botswana Educational Research Association, the University of Botswana, the University of Kwa-Zulu Natal and the University of the West Indies.

Building on the preliminary work undertaken by Ochs, it aims to provide data and detailed analysis to assist policy development both by the DfID as an aid donor and by national governments of countries affected. There are four key themes around which the project has been developed. First, an attempt to ascertain the extent of international flows of trained teachers among the case study countries. Are South Africa and Jamaica losing valuable trained manpower, while others are benefiting disproportionately? Are flows offset by significant reverse flows, which may indicate that sending countries benefit from the experience their teachers obtain abroad? How do such flows compare with those in related fields (e.g. health, tertiary education, IT specialists)? Concrete figures will enable policy-makers to assess the extent of the problem and to estimate benefits and losses. Secondly, the

causes of such flows are being examined. We hypothesise that much teacher mobility is 'demand driven', with flows generated in response to shortages in receiving countries. Other important research questions are how does the recruitment process work in practice, specifically the role of recruitment agencies and are those involved in the process, schools and overseas teachers, satisfied with it. Again, what are the 'supply side' factors? For example, inadequate terms and conditions in the home countries may also be significant. Again how do generation or gender issues or ethnic and racial issues impact on teacher's willingness to migrate. Thirdly, what are the social consequences of such flows in developing countries? Crucial here will be the linkages between migrant teachers and their home country, in terms of remittances, return migration and other effects.

We hypothesise that a key social cost of teacher flows to receiving countries is the cost of training teachers that subsequently migrate. Are teachers moving simply in response to better salaries and working conditions or are they interested in the opportunity to develop their career or access further training. The implications of teacher flows for recruitment shortages and the delivery of education services in receiving countries will also be assessed, with cultural attitudes towards overseas teachers a potential issue for further research. Finally, what are the policy responses to these flows? Depending on our assessment of the consequences of teacher flows, we will consider appropriate responses from both sending and receiving countries. A specific focus here is the financing of teacher training in receiving countries and possible measures to recoup the cost of such training from migrant teachers and/or sending countries. A more general policy of interest is teacher remuneration. We hypothesise that low levels of pay for teachers relative to alternative occupations is the key factor in generating recruitment shortages in both sending and receiving countries.

Conclusion

A multi-disciplinary approach is being taken in the collection and analysis of data. Where possible existing survey and administrative data are being examined to assess the extent of teacher flows, teacher pay (relative to other occupations and to teachers in other countries), and teacher shortages. Questionnaires are being given to samples of teachers who migrated to work in one part of the Commonwealth to another. These have been circulated in conjunction with the research partners, the appropriate teacher unions and through web-sites. As well as helping to understand the process of teacher migration, the questionnaires inquire into the remittances and other linkages that remain between the migrant and their home country. They ask also about teacher's future career plans and specifically the likelihood of return migration. On the qualitative side, interviews and focus groups are being conducted with officials responsible for recruiting overseas teachers, with policy makers and with employers at the school and institution level, together with migrant teachers and their local colleagues. The outcome of the project should have resonance not only in Commonwealth countries but also more generally. The expansion of the General Agreement of Trade in Services (GATS) into the realm of education has been greeted with controversy. Mode 4 of the agreement examines the movement of labour between consenting members indicating that the issue of teacher mobility will continue to be an important policy area. This research project should assist in understanding that process, its extent and its impact on sending and receiving countries. If you can assist by providing information about your own experiences or if you have a comment please contact The Centre for Comparative Education Research, The School of Education, The University of Nottingham, Nottingham, NG1 1BB, United Kingdom (+44 115 9514397) or Amanda.Sives@nottingham.ac.uk

References

- Barber M and Sebba J (1999), Reflections on progress towards a world class education system, *Cambridge Journal of Education*, 29, 2, pp.183-189.
- Borg C, Buttigieg J and Mayo P (2002), (eds), *Gramsci and education*, Rowman and Littlefield, Lanfield, Maryland.

- Bown L (1994), 'Active not passive: A Commonwealth agenda for re-directing student flows' in Bown L (ed) *Towards a commonwealth of scholars: a new vision of for the nineties*, Commonwealth Secretariat, London, pp.3-9.
- Burns J M (1978), *Leadership*, Harper Row, New York.
- Caldwell B J (xxxx), 'Re-inventing school leadership for lasting reform in the third millennium' in Day C, Fernandez T, Hague T, and Moller J (eds) *The life and work of teachers in changing times: international perspectives*, Falmer Press, London, pp.256-270.
- Chapman D and Adams D (2002), *The quality of education: dimensions and strategies*, Asian Development Bank and Comparative Education Research Centre, University of Hong Kong.
- Dollar D and Aart K (2000), *Growth is good for the poor*, World Bank working paper from www.worldbank.org/research.
- Gemmell N (1996), Evaluating the impacts of human capital stocks and accumulation on economic growth: some new evidence, *Oxford Bulletin of Economics and Statistics*, 58, 1, pp.9-29.
- Gotellmann-Duret G and Hogan J (1998), *The Utilization, Deployment and Management of Teachers in Botswana, Malawi, South Africa and Uganda*, International Institute for Educational Planning, UNESCO, Paris.
- Jones P (2001), Are educated workers really more productive? *Journal of Development Economics*, 64, 1, pp.57-79.
- Hopkins D and Levin B (2000), Government policy and school development, *School Leadership and Management*, 20, 1, pp.115-141.
- Knight J and Sabot R (1990), *Education, productivity and inequality*, Oxford University Press, Oxford.
- Leithwood K and Jantzi, D (1990), Transformational Leadership: how principals can help reform school cultures, *School Effectiveness and School Improvement*, 1, 4, pp.249-280.
- Mankiw N G, Romer D and Weil N (1992), A contribution to the empirics of economic growth, *Quarterly Journal of Economics*, 107, pp.407-38
- McKinnon D (2003), Speech at 15th Conference of Commonwealth Education Ministers, Edinburgh, September.
- Morgan W J (2003), *Communists on education and culture 1848-1948*, Palgrave Macmillan, London and New York.
- Morgan W J and Hopkins D (2000), Do we need a Commonwealth network of colleges of educational leadership? *The Round Table: The Commonwealth Journal of International Affairs*, 356, pp.459-470.
- Ochs K (2003), *A summary of 'teaching at risk': teacher mobility and loss in Commonwealth member states*, Commonwealth Secretariat, London.
- Organization for Economic Co-operation and Development (1994), *Teacher quality: synthesis of country studies*, Centre for Educational Research and Innovation, Paris,
- Oduaran A (2003), Order out of chaos: re-positioning Africa for globalization through lifelong learning, *International Journal of Adult and Lifelong Education*, 1, 1, pp.11-25.
- Roberts P (2000), *Education, literacy and humanization: exploring the work of Paulo Freire*, Bergin and Garvey, Westport, Connecticut and London.
- UNESCO (2003), *Learning to live together: have we failed?* The 46th Session of UNESCO's International Conference on Education, Geneva, 5-8 September 2001, International Bureau of Education, Geneva.
- Young A (1995), The tyranny of numbers: confronting the statistical realities of the East Asian growth experience, *Quarterly Journal of Economics*, 110,3, pp.641-680.