

Framing Education: A Conceptual Synthesis of the Major Social Institutional Forces Affecting Education

Duncan Waite

Texas State University

Lejf Moos

The Danish National University

Ciaran Sugrue

Cambridge University

Liu Cungang

Shandong Yingcai Vocational Technology College

Abstract

In this article, the authors sketch a model of the interactions among education and major social institutions. The worldwide effects of, in this case, the State, Commerce, and Civil Society (including religion and its institutions), are discussed. Macro and micro effects are examined. The model is offered as a starting place for further theorizing and application by scholar-practitioners.

Keywords: social systems, institutions, systems model, commerce, religion, the State

Education and 'Culture Wars'

Education, and its formal counterpart, schooling, seem at times to be at the centre of political or cultural debates, arguments and controversies. In the United States of America, for instance, education has, at various times, been at the centre of the so-called 'culture wars' (Anderson & Herr, 1999; Waite, 2002; Waite, Boone & McGhee, 2001). One of the battlegrounds in these culture wars, again using the USA as an example, has been the role of religion and religious beliefs in schooling; with interest in the science curriculum shown by, roughly speaking, those who believe in a more literal interpretation of the Christian Bible¹ and those who push for a conventional scientifically-informed curriculum. Across the globe, other issues dominate or deflect educational considerations – for example, immigration, nation-

al history and/or language can be divisive issues in national educational considerations, and this is particularly the case in Ireland, for example, where very recent economic progress led to a major influx of immigrants, challenging an educational system that is almost exclusively denominational.

What makes education and schooling of interest to policy makers and ideologues alike? Why is education an issue in political contests? How is education affected by these political contestations? In order to more fully comprehend education and schooling, we suggest educationists – policy makers, teachers and teacher-scholars, administrators and leaders – need a better understanding of the multitudinous societal forces that influence schooling and how they do so.

Though an exhaustive analysis of these societal forces and the issues they engender is nearly impossible – given their magnitude, scope and local variations – we wish to present here an initial and exploratory conceptualization of the social institutional forces at play that affect education, and the way they do so. This initial study on the social forces that influence education is, of necessity, tentative and illustrative (i.e., evocative), rather than authoritative and exhaustive. We offer this treatise as a springboard for further, more in-depth, examinations of education. The success of our efforts here will be evidenced by application of these concepts by variously-situated practitioners within different educational action fields (e.g., teachers and leaders), by educational policy makers, and by educational scholars. We believe that a more complete understanding of the social institutional forces that affect education would inform and, perhaps, improve the work of educators and others concerned with education and schooling.

On Models: Their Usefulness and Their Limitations

One difficulty in conveying our understanding of the forces impacting education is exacerbated by the media we have at our disposal. These media are both graphic – currently two-dimensional – and linguistic or verbal. In this latter instance, we are hindered by our facility with language, or lack thereof, and by the images or understanding (or lack thereof) our language is able to evoke for the reader. The nature of the media through which we attempt to represent the social institutional forces that affect education are inordinately static, where the forces we are attempting to depict are extremely dynamic. For example, the major social institutional forces we discuss and portray in our figure or schema (Figure 1.) are represented by two-dimensional rectangular boxes and the interplay between them by bi-directional arrows; whereas the forces themselves are neither so neatly circumscribed nor contained. They are not so well defined; that, plus the

interplay and intersection of the forces within an actor or a social situation are, again, dynamic and convoluted.

Herein lies another of the stumbling blocks to the presentation of a model, any model: the presenter's and the audience's level of understanding, influenced, in part, by the cognitive complexity either party possesses. Our own cognitive schema may serve as limiting factors in conceptualizing the principles our models intend. This limiting factor – and it is or can be substantial – is compounded by our mental acuity and by the nature of models in general. As we know, the map is not the territory. Our mental schema, though they have increased in complexity over the years, are still elementary representations of so-called reality. Examples abound of the increasing complexity of our models and the relative inadequacy of them (see Senge's [1990] discussion of mental models, for example).

Not too long ago, the predominant model in communication theory was the sender-receiver model, where the person initiating the communication sends a message to the receiver. Recent developments in communication theory, however, have shown increasing complexity in modelling communication. Consideration of context, intentionality, indexicality, reflexivity, discourse, dialogue and dialogism, among others, increase the complexity of communication models considerably. In other realms or disciplines, models are becoming more complex, and but scholars are still finding the limitations and inadequacy of them.

In the realm of economics, Samuelson (2005: 39), noted how 'our ideas for explaining trends in output, employment and living standards – what we call 'macroeconomics'– are in a state of disarray'. He continued: 'Economics textbooks once described the U.S. economy as mainly self-contained. Americans sold to each other; Americans' savings were invested mostly in American investments Trade was small. Globalization has shattered this model.'

He summed up by saying that, 'Although I could extend this list, the message would remain: change has outpaced comprehension' (2005: 39).

Or take another domain where modelling is both critical and highly sophisticated: weather forecasting. Despite recent advancements in predicting the weather from more sophisticated models, better instruments and the application of super computers to the task, still, according to a forecaster from the National Weather Service, 'Forecasting is still an inexact science' (Charles McGill as quoted in Brookes, 2005: 95). Incomplete understanding of the phenomena and inaccurate representation of them in a model both contribute to the problem: 'Even

the most sophisticated computer models drastically simplify the real atmosphere' (2005: 102).

Indeed, nearly every area of human experience is apt to be modelled. We apply mental models (Senge, 1990) to most aspects of our individual and collective lives. Religion, in general, and particular religions are a type of model, cosmological and ethical though they may be. Humans are meaning-making animals. In fact, some suggest that the human brain may be hard-wired to perceive patterns, even when there are none there (Guthrie, 1993). Anthropologist Stewart Guthrie claims this to be a survival instinct, and that it is often coupled with anthropomorphism – seeing a human or human-like hand in occurrences. Guthrie credits this impulse as being behind religious beliefs; that is, the belief that there is a human-like figure behind otherwise unexplainable occurrences and phenomena (many then call this impetus 'God'). Crediting previous thinkers 'from Bacon to Nietzsche and beyond' (Guthrie, 1993: 169) with parallel development of these ideas, Guthrie notes how we seem to be in possession of a 'perpetual and involuntary search for the most significant patterns. Immersed in this search, we see, as Bacon pointed out, more pattern than exists' (1993: 169-170).

Of religion, Albert Einstein wrote:

I cannot imagine a god who rewards and punishes the objects of his creation, or who has a will of the kind we experience in ourselves. I am satisfied with the mystery of life's eternity and with the awareness of – and glimpse into – the marvelous construction of the existing world together with a steadfast determination to comprehend a portion, be it ever so tiny, of the reason that manifests itself in nature. This is the basis of cosmic religiosity, and it appears to me that the most important function of art and science is to awaken this feeling among the receptive and keep it alive (Albert Einstein, *An Ideal of Service to Our Fellow Man*, 1954, cited in the *Austin American-Statesman*, July 30, 2005: E1).

Friedrich Nietzsche (1968: 274) noted how 'the entire apparatus of knowledge is an apparatus for abstraction and simplification – directed not at knowledge but at taking possession of things'. He further held that 'the most strongly believed a priori 'truths' are for me – *provisional assumptions*. . . .' (1968: 272, emphasis in original).

For both Einstein and Nietzsche, the popularly-held models of the time were inadequate or insufficient to explain how each understood the world, the cosmos, and human understanding itself. The inadequacy of models to capture lived experience is highlighted by Georg Simmel's (1968) observation that:

life as such is formless, yet incessantly generates forms for itself. As soon as each form appears, however, it demands a validity which transcends the moment and is emancipated from the pulse of life. For this reason, life is always in a latent opposition to the form (Simmel: 1968: 12).

Other human dispositions, limitations and/or self-imposed constraints flavor the models one might generate or the models to which one might be attracted. For example, egocentrism and self-interest, along with other human characteristics, influence one's perception. In a recent article on conflict of interest among physicians who accept money from pharmaceutical firms for research or for consultation – a prevalent practice in that profession – a professor of the Harvard Business School, Max H. Bazerman, is quoted as saying, 'When honest human beings have a vested stake in seeing the world in a particular way, they're incapable of objectivity and independence' (Harris & Roberts, 2007: A 18).

Models themselves embody both ontological and epistemological assumptions and have pedagogical implications, generally intended by the authors or designers of the model. (The converse is true, as well; i.e., that pedagogical models have underlying ontological and epistemological assumptions inherent in them.) However, readers and users of a model – this model and others – bring their own assumptions, biases and understandings to it. In the present case, we run the risk in introducing our model that it might be misread or misinterpreted (that is, read contrary to *our* intentions and/or understanding). It is, after all, only two dimensional, and limited by our capacity to conceptualize and communicate our understanding of the phenomena in question. A reader brings his/her conceptualization to the reading of the model's schematics. For example, a positivist might read a causality into the model that we do not intend.

The Forces at Play: An Overview

Throughout history, there have been at least three macro institutional forces at play continuously in dynamic interaction that have shaped human societies. There are, of course, other forces at play – forces, some of which might be termed 'natural,' that have a tremendous impact upon human society. For example, large weather patterns such as a tsunami or hurricane are not caused by social institutions, but, as in the case of global warming, may in fact be influenced by them, and influence them in turn. Other such forces might include over-population and poverty. Epidemics and pandemics are other forces with, especially today, global impact and are forces that, though they might not be 'caused' by the major social institutional forces, are in dynamic interaction with them. Other worldwide forces might be

more ideational or psychic in nature. Widespread epistemological or ontological changes might be initiated or spread by one or all of the three major institutional social forces we mention. These ontological, epistemological or, if you prefer, paradigmatic changes (Kuhn, 1962) stand in dynamic relation to the major social forces.

The major social institutional forces we wish to discuss are those inherent in a) business and commerce, b) government and the state, and c) civil society, including religion and the church(es). Wallerstein (2004), in his discussion of geoculture, described these phenomena as 'what liberal ideology had designated as the three separate arenas of modern, civilized social life: the market, the state, and civil society' (Wallerstein, 2004: 75). We, however, do not see these as separate. These social institutions and the forces they set in motion are always, everywhere in a dynamic interaction. The relative power or influence of any of these three, what we term the macro social forces, is/was dependent upon several factors, some of which we will address in the following discussion.

As an example of the dynamic interrelation of these forces, we note the World Values Surveys undertaken by Inglehart (2003) over the last twenty-five years. Inglehart has shown how representative countries' gross national product (GNP) correlates with either more traditional or less traditional values. Business/commerce, as represented by GNP, correlates with societal values; roughly, the wealthier a nation, the more likely it is to exhibit more secular or rational values, in Inglehart's terms. The poorer the country, the more likely it is to exhibit traditional or religious values. Inglehart's maps reflect values, wealth, and 'the cultural zones that correspond to the world's major civilizations as shaped by religion, patterns of colonisation, and other historical factors such as whether a society experienced communist rule' (2003: 32-33). The integration or over-laying of the economic map on the cultural map reveals how 'economic development seems to have a powerful impact on cultural values', where 'economic development seems to move societies in a common direction, regardless of their cultural heritage'. Nevertheless, wrote Inglehart, 'a society's cultural heritage also plays a major role' (2003: 33), and cites the effects of communist rule, the Catholic and Protestant churches and Confucian spirituality on its respective society's values.

Inglehart's (2003: 34) World Values Surveys and their analyses reveal the US to be a deviant case – high on both scales; that is, high on the economic *and* high on the religiosity/traditional values scales. Inglehart concluded that the US was not a prototype of cultural modernization for other societies to follow, claiming that 'On the traditional/secular-rational dimension, the United States ranks far below

other rich societies, having levels of religiosity and national pride comparable with those found in developing countries' (2003: 34).

Inglehart continues:

It is misleading to view world cultural change as 'Americanization,' as many proponents and opponents of globalization maintain. . . . Development and globalization are not making other countries resemble the United States. In fact, America is a major deviant case – a country that is both rich and religious. The impression that the world is becoming homogenized and moving toward a uniform 'McWorld' is largely an illusion. . . . Beliefs and values continue to differ radically, in ways that are not apparent until they are measured by surveys. Precisely because the manifestations of globalization are so evident, its effects tend to be overestimated (Inglehart, 2003: 34).

The deep cultural beliefs, values and, in our case, their manifestation through the interactions of the major social forces, is what we are attempting to draw out in this project; especially, in line with Inglehart (2003), their often subtle variation across cultures. We wish to stress both the spatial and the temporal dimensions of cultural/societal variation. Often an era, time or a specific locale at a particular time, may be characterized by the predominant influence of one or another of these forces.²

Lived Examples.

There are arenas of human interaction, belief and/or behaviour that fall outside the influence of the three major social institutional forces, at least in their ideal instantiation. However, the three major forces may, in some ways, attempt to colonize even these. Take, for example, human sexual intercourse: in their natural form, sexual relations between individuals are unmediated by business, the state or religion. However, sex is big business: 'sex sells.' Businesses use sex to peddle their products, just as some sexual relations are of a business or an exchange nature (e.g., prostitution). The government, at least in the US, has historically legislated against certain sexual practices (e.g., gay marriages, sodomy, and incest and paedophilia). Religion, and its various churches or denominations, attempts to influence the sexual practices of adherents as well. The Roman Catholic Church, for instance, historically has disapproved of the use of contraception. Its stance on abortion is well known, and continually stirs up controversy, as it attempts to influence US politics and policies at home and abroad.

There are, of course, many ways to approach an examination of the lived world and the forces at play within it. Often the approach one

takes is dependent upon the discipline to which he or she ascribes and/or practices; that is, the discipline in which the author, practitioner/scholar has been educated and socialized or that with which the particular individual feels most comfortable. For example, the issues with which we wrestle here might suggest, for some, the question of the interface between the public and private spheres. This poses the question of what constitutes the public and private realms, and how are they constituted? What processes are involved? What are the trends? What are the outcomes or ramifications?

Though we have chosen to undertake an examination of what we term 'major social institutional forces', we admit that there are other ways of looking at the world. However, we contend that the approach we take and the propositions we offer are relevant, or may be made so quite easily, to many, if not most, of the orienting questions of various disciplines. We acknowledge the particularity of what affects the individual, situated in a unique time and place. This model or schema may not be able to account for the universe of particulars. Our hope is that readers will consider it as another way to help think about what we do, as scholars of education and its practitioners.

We next discuss the 'major' social institutional forces and their interplay, with implications for education.

Religion/Church(es).

Within the arena of the civil society, and serving here as a proxy or a representative example, we find the social institutional force of religion. Religion/(church[es]), as we are using the term here, connotes the *institution* chartered to promulgate and enforce religious thought and belief (i.e., the doctrine or dogma) and their enforcement. As evidence of the phenomenon mentioned above – that is, that not all human interactions, beliefs and behaviours fall within the purview of one or more of the major social forces – we acknowledge that there are spiritual tendencies, beliefs, and practices outside the domain of any established religion or church. Though we do not wish to underestimate these spiritual forces, neither for the individual nor for the society as a whole (Rothberg, 1999), we hold that, generally, the more individualistic or particularistic spiritual phenomena wield less power over individuals and society than do organized, institutional religions and churches.

Throughout much of the last two millennia, the Roman Catholic Church, and several Protestant denominations have held sway over, especially, European society and its individuals (Sale, 1991). This dominance lasted until the Age of Enlightenment. This epoch saw a rivalry for supremacy between the Church and the state. The state

enlisted science as an ally in its rivalry with the Church (that and gunpowder) (Sale, 1991). During the so-called "golden age" of exploration, the Dutch, the British, the French, Portuguese and Spanish, especially, fielded missionaries, mercenaries, and merchants to new-found territories – these represent the business/commerce, state/government, and religion/church forces in our schema. Churches, too, used gunpowder to further their aims. It is reported that, based on a Papal edict, Spanish *conquistadores* were entreated to offer the natives they encountered 'salvation' through acceptance of the Catholic god. Those who did not convert, according to this edict, were less than human and, therefore, soulless and expendable. Often they were exterminated (Sale, 1991; Vidich & Lyman, 2000).

More recent social commentary on global trends in religion (Niezen, 2004) notes how the major world religions (Judaism, Christianity and Islam especially) have become less tolerant of others and more insular. They have, according to Niezen, 'settled into relatively fixed boundaries between believer and infidel and a renunciation of the idea of an earthly paradise to be formed by uniting an entire humanity of co-religionists' (Niezen, 2004: 8). This represents a trend analysis of the major institutional force of religion/church(es) in this day and age. Other trends seem to reflect a movement into educational provision by, first, the community, then the church(es), and/or the market. Religion and religious thought and values penetrate, for example, politics. Prothero (2007: 52), for instance, notes how 'faith may or may not move mountains, but it is doubtless one of the prime movers in politics, both in the United States and (with the notable exception of Europe) abroad'.

Education is part and parcel of religion/church(es). Religions gain adherents through biological reproduction (i.e., births to the adherents) and by conversion. Conversion, in many ways, takes place through education. Religious orders often sponsor schools for youth. These are usually, especially in the US, not under state control (in other countries, for example, in Ireland, Denmark, and several other Scandinavian countries, schools run by formalized religious groups receive state financial support). In some of the poorest countries across the globe, the state does not provide universal education to its citizens. In such circumstances, often the only educational options available for the population are either private education for the wealthy or religious schooling for the poor (e.g., the *madrashas*³), though members of the landed classes may opt for religious education as well.

In the US, where there ostensibly exists a separation of church and state, numerous controversies have arisen with regards to, for exam-

ple, the teaching of the theory of evolution in schools, versus the more religious view of so-called 'creationism' or, currently, 'intelligent design,' that correspond to a certain biblical interpretation that the Christian god created the heavens and earth, and all living creatures in six days. A recent survey found that 64 percent of those Americans polled felt that schools should teach creationism in addition to evolution (*New York Times*, August 31, 2005), where 38 percent favoured replacing the teaching of evolution with that of creationism.

Another current controversy in the USA has to do with the issue of vouchers – distributing educational funds directly to the individual or his/her family in order to permit him/her to take those funds to the school of their choice. Some opponents of this measure object on the principle that these public funds will be used to support (private) religious schools, or schools run by religious organizations/churches.

As regards curriculum, at least in the United States, most schools run by religious organizations offer study in the major disciplines – math, science and language arts. The pedagogy employed parallels that in public schools. However, teachers in these schools are generally paid wages that are below those paid their counterparts in state schools; and the curriculum may be designed and published by a company specializing in religious curriculum. Also, religious schools in the USA are generally exempt from certain state policies, requirements and stipulations (for example, as regards standardized testing and teacher certification).

Business/Commerce.

We take business/commerce, as a major social force, to mean those organized activities intended to accumulate capital, whether through manufacture, sales, or service. As with religion, as discussed above, there are certainly instances of commerce – the exchange of goods, services, and capital – that are not under the aegis of formal, business organizations or institutions (e.g., exchanges on the so-called black market or through an informal barter system). Of the three major social institutional forces discussed here, business/commerce among humans arguably has the longest history. Historically, accumulation of capital, or excess goods and services, led to the development of civilization, as subsistence hunters and gathers developed agriculture. Accumulation of capital permitted the owner to invest the excess. In the hands of the state, this excess could be invested in offering goods and services to those less fortunate (the so-called 'welfare state' or social safety net), could be invested in supporting the arts and other intellectual endeavours (e.g., state-sponsored research and scholarship), and, more often than not, was invested in militarization and territorial expansion (as with the Roman Empire).

Business/commerce and education. As with the inter-relations between other concepts and social forces, the relation between business and education is complex and dynamic. For example, during the Medieval epoch in Western history and perhaps earlier, businesses, especially those of artisans, developed a system of training workers – the apprentice system. Gardner (1991) held out the apprentice model of learning as a viable alternative for teaching/learning today, without the relational subjugation. The appeal of the apprenticeship model of learning is that it involves the learner nearly totally – intellectually, emotionally, holistically. For example, there is no need for the master to make explicit the relevance of what the pair does. It is understood, and at a deep level. The learner's motivation is a given. Apprenticeships, however, are time- and labour-intensive. This makes them costly.

Other business education models have sprung up, paralleling changes in the wider society. Business skills are taught in secondary and tertiary educational institutions, from rudimentary skills such as mechanical drawing and basic accounting, as examples, to more theoretical and conceptual skills and abilities. Courses in business and business administration are part of the curriculum offerings of many public secondary schools. Colleges of business today enjoy a privileged status in many public and private higher education institutions.

Businesses, themselves, are, or can often be trailblazers in piloting or incorporating newer adult and organization development practices.⁴ Businesses, though vulnerable to bureaucratic stasis in the main, are still unhindered by the policy constraints of public institutions (Belbin, 1998). The individual's role in/for business/commerce is multifaceted: he/she plays a role as a consumer, customer, or client for goods and services. The individual is also a producer and entrepreneur. The individual also plays a role as a distributor, as a salesman/woman and marketer. Finally, the individual may perform a creative function within the business community or organization he/she is part of, such as in the role of inventor or in a research and design capacity.

Another example of the intricate interplay between business/commerce and education is found in the area of advertising – a type of public education. Businesses spend great sums of money on advertising, educating consumers with the intention of enticing them to buy the goods or services a company offers. This is the purpose of this particular type of education, which the frame we offer allows us to examine more closely. The educational goals of advertising range along a continuum from simple information presentation to behavioral modification (action). Purchasing a product is an example of one such action.

'Public education' of the sort provided by business differs markedly from that offered by public schools, though there are parallels. Though, in the US, advertising and its product claims are loosely monitored by the state, in no way could it be said that even the most forthright company's claims constitute so-called 'truth in advertising.' The difference (and the comparability with public education, both as to similarities and differences) comes, for example, in what is said and what is left unsaid. Companies employ specialized firms to develop the message they want to introduce into the public discourse. The giant retailer Wal-Mart has bankrolled various public relations campaigns in order to counter the negative press it has received concerning, for example, the hiring of undocumented foreign workers, the unequal treatment of women in hiring and promotion, and executive malfeasance (Barbaro, 2007). Public relations are education for business.

These instances, and hundreds more like them, point to the complex relations between a 'major' and a 'minor' social institutional force (business/commerce and education in the present instance). In this case, business is using education to, in effect, propagandize, to plant an image or counter an image in the public's mind. True, education, or, for our discussion, more specifically, schooling, has been used to propagandize (for example, the use of jingoistic texts by nationalistic regimes). But, in the ideal school and its curriculum, there is more concern with educating child citizens to the 'truth' of a discipline (truth being a relative term), than propagandizing; though there are those who might argue that any proposition has an ideological or particular ontological underpinning; the truth is relative and, therefore, perspectival.

In the USA, a large proportion of the economic activity is generated by consumer spending. Evidence of the dynamism and complex interrelations between business and education comes in the form of pressure on the public sector to inculcate the skills business and commerce need and/or desire in workers. Controversy ensues when policy makers and the public consider the question of just whose responsibility it is to educate citizens for future work roles. In the USA at least, this educational responsibility was codified as early as 1918 in the Cardinal Principles of Secondary Education, developed and publicized by the Commission on the Reorganization of Secondary Education and 'vocation' was one of the seven guiding principles, along with health, command of fundamental processes, worthy home membership, civic education, worthy use of leisure and ethical character.

Still, the line of demarcation between business/commerce and public education is often tested and contested. Several public interest groups have sprung up in the US, especially, to monitor and, when

they feel necessary, to protest the incursion of business/commercial interests into public schools and classrooms. Examples of such incursions by business into so-called public education abound: Channel One™ offers schools free televisions if they agree to show the 'news' produced by the company, with extensive advertising. The Edison project is a for-profit school management company. Coke™ and Pepsi™ both seek exclusive, million-dollar contracts with high schools to provide beverages and advertising in schools and school stadiums.

The influence and power business/commerce has to affect education was readily apparent, in the US especially, with the publication of *A Nation at Risk* in 1983 (National Commission on Excellence in Education, 1983). The rationale for (again) reforming the US public schools was that of (re)gaining a competitive business advantage. A competitive business advantage has been a principal rationale of school reform initiatives ever since, no matter how the USA, in this instance, fares economically (McNeil, 2000; Waite, Boone & McGhee, 2001). Schools are singled out for attention and, often, culpability; absent are larger questions concerning society as a whole or other important issues affecting the polity. Though, as we have written, the interrelations are complex and dynamic, still it can be argued that the influence business has on education far outweighs any reciprocal influence education has on business, especially in policy matters (Waite, Boone & McGhee, 2001).

The influence of business on education has been well documented (Callahan, 1962; Waite, Boone & McGhee, 2001). In primary and secondary schools especially, the overall global trend is of managerialism, a relatively recent phenomenon captured by the term New Public Management (Dempster, Freakley & Parry, 2001; MacBeath, Moos & Riley, 1996, 1998; Moos, 2000). New public management entails:

a reduction in government's role in public service provision; the imposition of the strongest feasible framework of competition and accountability on public sector activity; explicit standards and measures of performance and clear definition of goals, targets or indicators of success, preferably in quantitative form; a greater emphasis on output controls – a stress on results, not processes; and a reduction in the self-regulating powers of the professions (Dempster, Freakley & Parry, 2001: 2).

For us, the issue is not whether new public management is a reality – for we readily accept that it is; the issue is how pervasive, how deep is its colonization of the world of education, and, what further directions this might take, and its effects. We are convinced that many social functions and their organizations – education and schools, for example, or medicine and hospitals – are beset by what we

term 'creeping managerialism.' Creeping managerialism reflects the manner in which a managerial mentality has, over time, permeated our social institutions, resulting in domination by the managerial mindset over other possible ideologies or ways of operating (i.e., models of organizational operation). Creeping managerialism privileges decision making that is based on quantitative data, as though such decisions were value-neutral. For example, schools in the USA are encouraged to engage in 'data-driven decision making'. Such a model and those who apply it are under its sway and might not recognize or acknowledge that it is simply one episteme among many. Other models and modes of living/managing social institutions are outside the realm of consciousness, they are 'contained' (Popen, 2002).

Sinclair (1995) reminded us that managerial accountability is one of five types – along with political accountability, public accountability, professional accountability, and personal accountability. And the second author (Moos, 2005) claims that there is a need to add another accountability – ethical accountability, calling our attention to the basic obligation of schooling. So the fact that managerial accountability is prevalent in education is unremarkable. What is remarkable is the degree to which managerialism has usurped the roles of others. Managerialism, in this sense, has become hegemonic. Such intrusions (i.e., of business or management thinking and practice) penetrate the individual psychic level – both inter- and intra-personal, where, rather than a culture war, it manifests in what Waite (2006) terms a 'guild war.'

Additionally, and as Dempster, Freakly and Parry (2001) acknowledge, educational organizations are increasingly prone to the forces of marketization. Competition among schools is fast becoming the rule. This competition is exacerbated by publication of league tables or school test score data (Canaan, 2002; Gilbourn & Youdell, 2000; Waite, Boone & McGhee, 2001). Provisions of the current Texas (USA) education code and the recently enacted federal legislation, "No Child Left Behind", permit students from so-called "failing schools" to transfer to another school district, taking their federal funding with them. Schools have begun to compete for these students and the federal dollars that follow them.

Education itself has continued a trend toward increased commodification, especially in higher education. Among other things, education has become more of a commodity – to be bought, sold, traded, and affected by all other market forces. As an example, the US is pushing for higher education to be covered by the controversial General Agreement on Trade in Services, or GATS, treaties (CAUT-ACPPU,

2002). The US goal, according to Douglas Baker, the then deputy assistant secretary of the US Department of Commerce, is 'to create the conditions for international competition in education services with minimal government interference' (§ 3). According to some critics of this proposal, trade in education, of the sort proposed, increases the already strong influence of the private sector (as noted above) and removes such education from public accountability and absolves it of public responsibility.

Hybrid combinations of the forces of marketization, new public management, creeping managerialism and commercialization of education have severe ramifications for education worldwide. Government financial support for colleges and schools is being reduced. Political support for public schools, in the USA at least, is being undermined. Services are evaporating or becoming privatized. Budgetary constraints are forcing many schools to cut programs and services.

'Major'/'Minor' Social Forces

All of the major social institutional forces are in a dynamic interaction with each of the others. Collectively, all three influence local social conditions. Aside from these three, there are many of what we might term 'minor' social institutional forces – those forces that, though influential, emanate from one of the major social forces, even if they may eventually infiltrate the other areas or become powerful forces in their own right. In our typology, these 'minor' social institutional forces are subsumed within the major forces, at least in the first instance. Some of the outcomes – products or processes – that originate in the so-called minor forces assume such monumental influence as to have a 'pushback effect' on the more macro forces. Examples of what we are terming 'minor' social forces are culture and technology, though there are others. Areas that are difficult to include in a discussion of social forces, major and minor, affecting individuals and societies are those that are characterized by potentiality: those areas whose impact is more ephemeral and less tangible. For instance, the domain of ideation is difficult to conceptualize, let alone include in a discussion such as this. Another aspect of the lifeworld that is relevant to our discussion, perhaps more of a way of analyzing the phenomena that influence us and our world(s), is that of capacities – realized and potential.

Almost any of the areas we consider to be social institutional forces can be thought of as domains wherein there are limits and/or potentialities. Take the individual as a unit of analysis, and the individual's relation to the community or communities of which he/she is part. (See Figure 1.) Any individual has certain capacities and potentialities.

ties. Whether the capacities and potentialities are realized has to do with the nature of the individual and his/her relation to society or the community. It has to do with the type of community (or communities) the individual is in, and the time or epoch in which he/she lives. Certain physical attributes of individuals, for instance their ontogeny (Dannefer & Perlmutter, 1990), are relatively fixed at birth; they follow a more or less fixed trajectory from birth to death. These can be thought of as species genotypes.

A species' phenotype, those amenable to education intragenerationally, are more the focus of this study. Many of these capacities or attributes of individuals are better characterized by their potentiality. Take the human emotions, for example. Humans have an unlimited potential for love; or its opposite, hate. The difference between relatively fixed capacities and potentialities is demonstrated by consideration of the difference between the brain and the mind – one is biological, the other ephemeral. The brain's capacity is relatively fixed (relatively, because arguably we have yet to realize its full capacity, and it is somewhat malleable), the mind's nearly infinite. The area of human creativity is another that can be thought of as nearly endless, yet subject to limitations placed upon it by time and place – by either societal constraint or liberation.

Any of the social forces and the effects that they have on individuals and communities of individuals can be thought of in terms of the limitations they present or the potentialities they foster. What we are concerned with are the unused capacities, the potentials, and, conversely, the limits encountered by humans, as we further explain the major and minor social institutional forces and education, schooling and educational leadership.

Culture

Like the other social forces discussed above, culture is a dynamic force. Though conceptions of culture and its definition have evolved, still, and quite simply, culture can be thought of as that which is learned. (Simply, this is the difference between the genotype and the phenotype, as discussed above.) As such, culture and education are linked (Bruner, 1997). The literature in the anthropology and education field, particularly, discriminates between *education* and *schooling* (Waite, 1998). Schooling is the more formal, institutionalized process of the two; education is the more holistic. Though linked, the relation between education and culture is a contested one. Much of this dissensus stems from differing understandings of culture and from different epistemological stances. For example, those who believe in determinism (or even structural functionalism) suggest that culture

determines what people learn, and how. The 'reproductionists' (e.g., Bourdieu and Passerson, 1977), suggest that education contributes to the reproduction of a society's inequalities.⁵

Recently, a more dynamic, complex and interactive view of the interrelation between the individual and culture has emerged (Varenne & McDermott, 1999; Waite, 1998); in this view the individual and the culture are mutually influential. This is captured in the literature of, say, sociology as the interplay between agency and structure (Fine, 1992). Besides the different views of both the nature of culture (and of education) and those having to do with the interrelation of the two, we must acknowledge that there are within any of the major discursive fields mentioned (i.e., the 'major' and the 'minor' social institutional forces), multiple discourses or ideologies at play at any given time. That is, there is generally an historically-dominant discourse (or culture, or business/commerce practice or ideology); while, and at the same time, there are numerous counterdiscourses or 'minority' discourses at play within the same discursive field. We in no way are proposing an essentialist or reductionistic view of any of the phenomenon under discussion.

Technology

Technology, as we understand the term, is simply the externalization through technical means of human abilities and creativity. Adherents and scholars with different epistemological stances view technology differently – either as, for example, instrumental and value-neutral or as having profound subjective and value-laden origins and effects (Diamond, 1999; Feenberg, 1999).

Though we have listed technology as an example of a 'minor' social force, there are those who have suggested that it is one of the major driving forces in civilization (Feenberg, 1999). We have no doubt that even a relatively simple technology, can have profound effects on worldwide trends and infiltrate many other areas of social life. For example, a recent study has proposed that the historical development of such a simple device as the sewing needle had dramatic and far-reaching consequences (O'Brien, 2004). In this case, the sewing needle permitted early people to make clothes that were form-fitting – an improvement over the previous practice of simply wrapping furs or animal skins around the body, even if held in place with some fastener like a belt or sash. Form-fitting clothes, according to this theory, yielded warmer clothing, which, in turn, allowed earlier peoples to hazard colder climates. This simple technology contributed to the migration of peoples across the Bering Strait and into the Western Hemisphere (i.e., the Americas). This relatively simple technology had profound effects.

There are schools of thought that hold that technological innovation occurs in a rational and instrumental fashion (Feenberg, 1999). A simple way of stating this is that innovators decide in a rational way what is needed and set out to design or invent such a technology. An opposing school of thought contends that technologies are developed, perhaps initially through or within (non-rational) cultural processes, but that culture has less of an impact (and is less instrumental) in the development of a technology than the other way around; that is, the advent of a new technology precedes its adoption and impact. New technologies are developed all the time. Some are discarded or ignored and some are adopted. Only then, in an arational way, do those adopted technologies impact the culture more widely. Examples of these processes are ready-to-hand and include such technologies as the internet and cell or mobile phones.

The early stages of adoption of those technologies that eventually have a profound influence on society/culture and human interaction and association, is uneventful, often unplanned. Though many technological innovations are developed, relatively few are picked up by the public. The mistake we make as a member of the general public is the same mistake that affects some scholarship concerning technological development and adoption. It is the same error that, historically, contributed to faulty reasoning in the biological and social sciences; that is, a misconception and misapplication of evolutionary principles. Throughout most of his professional career, the paleontologist Stephen Jay Gould (ca. 1941-2002) campaigned against pseudo-science and the misapplications of, especially, Darwinian evolutionary theory (e.g., Gould, 1996). Specifically, he targeted social evolutionary theory and creationism (Wikipedia, 2005).

For our purposes here, Gould's argument applies like this: The fact that certain technologies (or cultural forms or even human characteristics) predominate is *not* a sign of divine intervention, moral (or other) superiority, or even destiny, but rather the outcome of a random, some might say haphazard, process of selection. The predominance, the 'survival,' of certain forms has not been pre-ordained and is not purposeful and rational. We commit an error in reasoning when, looking back on the paths taken to arrive at the present state, we deduce that this present was somehow meant to be (i.e., the will of God, evidence of moral or other superiority). In a strict Darwinian sense, all the present is evidence of is the selection of a form due to its adaptability (survival advantage) given past and present conditions. The conditions, as the premise of our present thesis attempts to point out, are not given, as in the sense of some objective 'reality,' but are constructions, and often a-rational, sometimes unconscious. Take

technology, as in the present example. There are numerous examples of social or market selection based on unconscious social processes, such as the choice between the VHS and Beta formats for videotape recording and playback, or the difference between eight-track and cassette audio recording. Some of the factors that favoured one form over another include timing, marketing (i.e., persuasion [see above]), funding and even luck.

To further highlight some of the social forces at play, we return to a discussion of the technology of cell phones and their use. As this technological application has gained popularity, its use has upset social forms and mores. Cell phone use, as an example, has opened up what anthropologist Victor Turner (1967) termed a liminal space – a transition space between the here-and-there, the this-and-that, caught between two roles or cultural ways of being. What are the norms for cell phone use? During liminal transition, we experiment with norms, we make them up as we go. Some complain about cell phone use in theatres during live performances. Libraries have signs asking patrons to silence cell phones and put off making and accepting calls while in the library. This phenomenon of the intrusion of cell phone communication has spawned its own vocabulary. There are what are known as 'Blackberry prayers,' where Blackberry™ users (Blackberry is a form of phone that includes email communication by WiFi) bow over their cell phones or PDAs (personal data assistants) while in a meeting, seemingly in prayer. In liminal space, norms of use are fluid and not well established, and transgressions are common.

An Israeli company has developed a cell phone signal jammer – a device that cancels out or jams microwave transmissions to all cell phones within a certain, relatively small radius. These devices have been purchased and employed in several of the larger churches in Mexico; however, their use is illegal in the US. The US is a more 'business friendly' country, under its rules, laws, and regulations. In fact, the former chairman of the US Federal Communication Commission, Michael Powell, son of former Secretary of State Colin Powell, created quite a stir by suggesting that his agency would encourage the commercial airlines to modify and eliminate the technical hurdles that prohibit cell phone use while in flight.

Though adoption of certain innovations/changes is often haphazard, some cultures (the decision-making authorities of a society or group), attempt to control their group's adoption and use of, for instance, technology. There is no body with such authority for the US as a whole, it relies more on market forces to regulate, especially, certain business/commerce/market technologies or forces. However, even with-

in the US, certain groups, such as the Mennonites, attempt to screen some social forces, such as technology, according to criteria established by church elders (Waite & Crockett, 1997). These elders determine which technologies will be permitted for use by church members and how. For example, one group permitted computer use, but only for its business record keeping function (Waite & Crockett, 1997).

Again, from the US experience as an example of the interplay of the forces we examine, while the US government/state has recently moved to have a lighter hand in regulating the market, it has, paradoxically, introduced or encouraged development of certain technologies that are of questionable societal good and which fall within an ethical gray zone. For instance, nanotechnology has not been cleared, in its critics' minds, as being environmentally safe. There are questions of the effect nano-particles, nano-machines and nano-compounds will have on the environment. The politics and policies regarding other environmentally-sensitive substances reveal the US government's methods and its current relation with business/commerce. Recently, it was revealed by the US Environmental Protection Agency's Inspector General that the staff of the Environmental Protection Agency 'ignored scientific evidence and routine protocols when they set new limits for mercury pollution' (National Public Radio, 2005: 1). Further, the news program related that 'critics say the agency bowed to pressure from industry and the White House'. The results of a lower standard for mercury contaminants could be substantial for industry, especially those that burn coal to power their generators.

Or, as another example of questionable ethics in state/business relations, consider the US Army's development of a weaponized robot, the SWORDS (Special Weapons Observation Reconnaissance Detection Systems) (Ulin, 2005). These remote-controlled '3-foot-tall robotic "soldiers", outfitted with tank tracks, night vision and mounted automatic weapons capable of firing more than 300 rounds at a burst' (Ulin, 2005: A11), are capable of hitting 'a nickel-sized target at 328 yards. In one test, a SWORDS scored 70 out of 70 bull's-eyes'. The concern for ethicists and others is that the further sanitization of war will dehumanize the Other, and, perhaps ourselves: 'What does it say about us that this is how we use our creativity – to invent robots that offer more efficient ways to kill?' (Ulin, 2005: A11). Yet these killing machines were slated to be deployed in Iraq.

If technology leads culture, where is it taking us? What is the relation among technology, culture and education?

Technology, culture and education: one aspect.

A snapshot of the culture of schooling, especially in the US and certain other 'Western' countries, reveals the/an effect or influence of technology. The curricula in the US are particularly discipline-based (Tanner & Tanner, 1995). Knowledge is organized in a silo or stovepipe manner (i.e., vertically). The knowledge reflected in the explicit curriculum is also organized hierarchically, with the discreet 'facts' and smallest bits of disciplinary knowledge at the lower end, and the more abstract theoretical knowledge at the higher ends. In school knowledge (i.e., that privileged and explicitly taught), the disciplines are separated one from another. Other forms of curricula are relegated to an 'Other' category and are part of minority discourses. Alternative forms of curricular organization – such as integrated curriculum, project-based curriculum, or student-centred curriculum – are sometimes part of the curricular discourse, but are not the prevalent form of curricular organization practiced in US schools, and in those of many other 'Western' countries. In our schema, curriculum organization is a type of technology.

Another form of technology that is heavily influential in schools today is that of testing; though testing is, in reality, a complex formulation of multiple technologies. For example, computerization makes large-scale testing possible. Business interests are evident in high-stakes testing as well. Sloan (2003) suggested that, in the US, multinational textbook companies are engaged in both the development and marketing of high-stakes tests and the textbooks and curriculum to 'fix' any problems uncovered by testing, something that could be perceived as, if not a conflict of interest, potentially self-serving.

Whether the technology led the culture as concerns wide-scale testing, we cannot be sure in this case. What we can be sure of is that the current culture in and around schools places heavy emphasis upon standards, testing and "accountability". A newspaper in 2005 carried an editorial (Young, 2005) by a syndicated columnist from Waco, Texas (US) titled "Testing Instead of Learning". Young cites a letter he received from a secondary mathematics teacher which supports the assertions we have made above. The letter writer noted how high school students who failed exit-level math exams are pulled from so-called extra-curricular or "special area" classes (e.g., art, physical education, music) to "practice" for the upcoming TAKS exam; in addition: "They are to be excused from all work in their classes during this time" (Young, 2005: 9). Young went on to write that this teacher's:

concerns are really a critique of one-size-fits all education, of standardization. This math teacher's words are an advisory that the whole of educa-

tion is being lost to 'accountability' for some children who really need to be inspired in any way by a broad-based exposure to the world of ideas, concepts, and life skills and potential careers, while learning reading and math (Young, 2005: A 9).

The editorial cites Angela Valenzuela and her contention that 'the testing system doubles as both an assessment and monitoring system – monitoring the behaviour of the adults'. Further, Valenzuela is quoted as saying, 'the [accountability] rhetoric gives the impression that all children are finally being taught. The reality is that this often translates into dumbed-down, routinized, test-driven, ratings-focused pedagogy'.

This aspect of modern culture results in what we call disciplinarity – a term we employ to capture both the discipline-based organization of knowledge and the surveillance and sanctioning of teachers' and students' adherence to and performance in the transmittal of and acquisition of competence in these narrowly-defined knowledge domains. Disciplinarity reflects the Foucaultian (Foucault, 1995) sense of discipline and punishment (Hargreaves, 2004). Another way to view this phenomenon is through the lens provided by the sociologist Erving Goffman (1959), that of impression management (Waite & Allen, 2002). In this perspective, school administrators and policy makers give the impression that children are learning, that schools are educating students. But absent in the dominant public discourse is the psychic cost paid by both the children and their teachers.

Application of the Schema

One of the outcomes we intend for this project is that the schema we present may be picked up and used by practitioners and policy makers. We have attempted to make a more interactionist ontology accessible and available for anyone involved in planning educational programs, anyone situated anywhere within the domain of education. We have sought not to provide too much detail, or specify the exact amount of influence or "force" of any of the social institutional forces that may have an impact on a particular local scene, individual, or educational organization. This is a conscious move on our part, intended to permit the user to take the framework we provide and fill in the particulars for his/her situation. No doubt, there are forces we have neglected to consider that are highly relevant to one particular local situation or another. We claim only that this is a broad framework, open to interpretation and inflection and questioning, but it is a start.

Though our framework incorporates an interactionist ontology, we have also consciously avoided imbuing it with any particular theoret-

ical perspective (e.g., a feminist post-structural lens, or a postmodern philosophical perspective) in order to permit the user to bring his or her own theoretical propositions to bear on the forces at play as a means of illuminating the contexts within which s/he operates from his or her orienting philosophy. We have attempted to make the framework non-prescriptive. We provide the 'map'; the user supplies the details and performs the calculation in order to arrive at some insights that are applicable to his/her situation (or that of collectives) and that do not run counter to his/her core beliefs. Of course, it might be that application of the framework we present may serve as a springboard to consideration and discussion of those deeply-held, core beliefs, as the beliefs held are an important aspect of any local scene or school culture.

As it is, one can enter the model or schema from any point. For instance, someone can begin at the macro level and begin assigning or naming those macro forces that influence their lived social world and proceed to the local or micro level. Or, someone might choose to begin with an examination of the local forces at play and build 'upward' toward the macro. In this sense, the framework we provide would assist those involved in constructing a strategic plan for their organization (the collective, organizational application). This framework is especially suited to the environmental scanning portion of a strategic plan. Or, an individual may work to theorize and illuminate the forces that impact him or her as an individual. Consideration of the interplay between the individual and the collective is important in this instance, but the other forces and trends within them are equally worthy of consideration.

Conclusion

The schema or framework presented here is non-prescriptive also in the sense that we cannot tell the user what to do with the information, how to respond. Choices of modes of action or response are situationally dependent to such a degree that they must include consideration not only of the social forces, major and minor, that are in play, but of the resources available, the beliefs and culture of the arena of action, and the strategies and tactics thought to be effective. It is nearly impossible to articulate these from afar, and transcendently, for all time, and in all places. Therefore, we leave the details to those who are embedded within the local scenes.

Also, though we have sketched what we believe to be the major and minor social institutional forces, we admit the probability (the likelihood) that we have omitted consideration of some relevant forces (e.g, it may be that spiritual or ideational forces are important and not

explicitly included in our schema) for certain local situations. We intend for our schema to be open enough, and merely suggestive of some possibilities, that it can readily be adapted or altered. We do not intend for this schema to be authoritative or conclusive. Rather, we see it as evolving and open. We see it as a starting point for illumination of those forces that constitute the structures, however dynamic, within which and through which human actors practice their individual agency. We intend for the schema to be more organic than mechanistic, and malleable rather than fixed.

Notes

1. These are the so-called 'creationists'; so called because they believe the Christian god *created* the universe in, according to the biblical text, in six days. They then believe in a global chronology that would follow from and support that belief about the genesis of the world/universe. They reject other theories (e.g., Darwinian evolution) as inconsistent with their beliefs or what they perceive to be the 'facts' of the case.
2. As an example, the current cultural conditions in much of Continental Europe (e.g., Denmark), are such that the second author holds that business/commerce and the government/state are influential, but suggested that civil society be placed in a superordinate position relative to the church/religion in our model. The implication is that Denmark is a much more secular society than some. This seems to corroborate Inglehart's (2003) work.
3. 'In a general sense wherever the governments do not provide general education to a common citizen, private religious establishments have taken the lead to fill this gap and run the educational system of the country on their own, although in Ireland, all teachers, regardless of school type are paid on a common basis scale. In this context, a madrasah is referred to as an Islamic school for the Muslims, just as a parochial school for the Catholics or yeshiva for the orthodox Jews. Although these institutions are academically assigned to provide general education among children, they also have the obligation of teaching children about the fundamentals of their religion. In the case of the madrasahs, Islam.' (1). Wikipedia (2005), downloaded September 19, 2005 from <http://en.wikipedia.org/wiki/Madrassa>
4. It is interesting to note, however, that a relatively small percentage of businesses account for the largest share of professional development expenditures for their employees, and those monies go disproportionately for the training and education of the highest paid, salaried executives, seldom for the wage or line workers.
5. In deference to the authors cited, we present the weaker version of their argument. The stronger version would insist that education *causes* a society's inequalities.

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Appendix

Figure 1: Social institutions and their relation to schooling or education

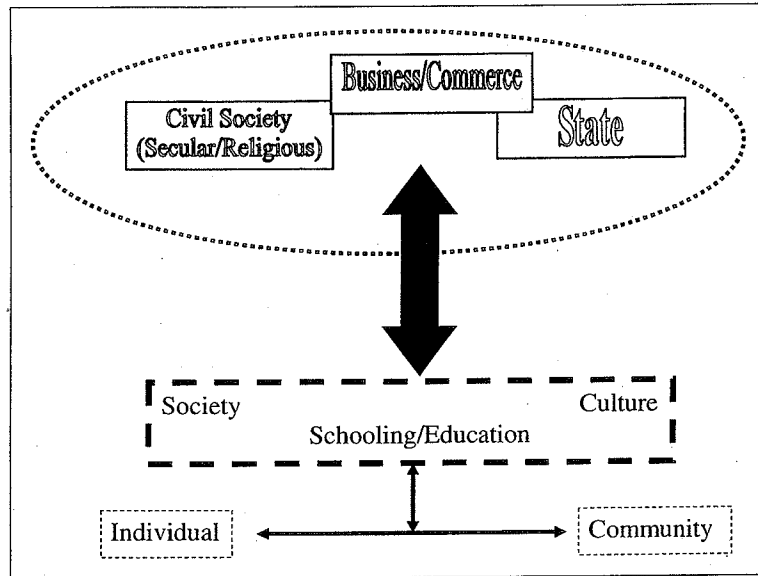
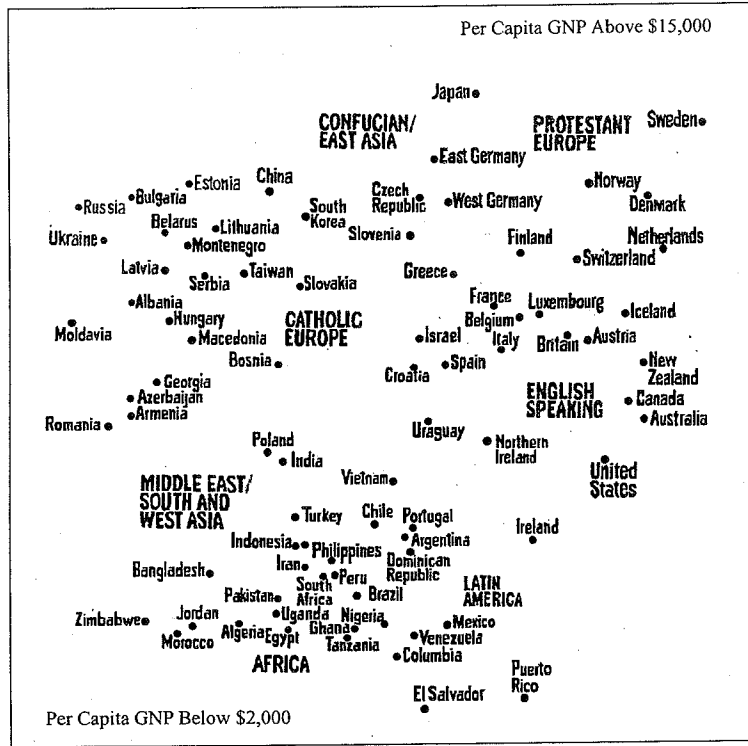


Figure 2: Selected countries' gross national product (GNP)



Based on World Values Surveys: R. Inglehart (2003, Fall). World values. LS&A Magazine, p. 33. Used by permission.