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2024.gada 24.maijs

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**AUGSTĀKĀ IZGLĪTĪBA**  
*Higher Education*

# HEI SUSTAINABLE COMMUNICATION IN SOCIAL MEDIA: E-COURSE EVALUATION VIA TRIANGULATION METHOD

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**Abstract.** *Given that sustainable communication is already a complex phenomenon, the role of social media, currently growing rapidly, is underestimated by universities and academia. The present research aims at analysing the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” for HEIs teaching staff. The exploratory research was leveraged in this work for the e-course construction and evaluation. The exploratory empirical study was implemented in 2022-2023. The empirical study was built on the triangulation method referred to data collection and data analysis. The sample was composed by six trainers, 15 participants, and two experts. HEIs sustainable communication in social media is beneficial for all the involved as it supports just green transition, e.g. by lowering the carbon emissions by, for example, commuters, aimed at reducing climate impact and mitigating climate change. The empirical study allows drawing a conclusion that the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” for HEIs teaching staff was positively evaluated. The positive evaluation proposes that the e-course is effective and efficient.*



**Keywords:** *e-course evaluation, higher education institutions, ranking, social media, sustainability communication, sustainable communication, triangulation method.*

## **Introduction**

Sustainable communication of higher education institutions (HEIs) in social media is beneficial for both, on the one hand, for higher education institutions, and, on the other hand, for a wider society. Sustainable communication of higher education institutions in social media links higher education institutions with all the relevant stakeholders aimed at strengthening regional development as well as economies (Ahrens et al., 2021). Social media establishes two-way communication between higher education institutions and a wider society with the help of different skill sets.

Given that sustainable communication is already a complex phenomenon, the role of social media, currently growing rapidly, is underestimated by universities and academia. A reason could be that the competence of higher education institutions' teaching staff in sustainable communication of higher education institutions in social media belonging to higher education institutions have to be increased (Ahrens et al., 2023).

Conventionally, education and training are widely recognized as the efficient way of competence development (Ahrens, Zašcerinska, Lange, & Aļeksejeva, 2021). Particularly important is e-education (electronic education or online) and e-training (electronic training or online) as it helps lower the carbon emissions of, for example, students commuting to campus in order to reduce their climate impact (Versteijlen, Wals, & van Wee, 2023) and take measures for adaptation to mitigate the impact of natural disasters (Mackey, Gilmore, Dabner, Breeze, & Buckley, 2012).

The present research aims at analysing the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” for HEIs teaching staff.

The exploratory research was leveraged in this work for the e-course construction and evaluation. The exploratory empirical study was implemented in 2022-2023. The empirical study was built on the triangulation method referred to data collection and data analysis (Zašcerinska, 2013). The methods of data collection were an online survey for the e-course participants, focus group interview with the e-course trainers, and semi-structured interviews for the e-course experts. The data from the online survey were analysed via mean and frequency analysis as well as ranking, while from the semi-structured interviews – via content analysis.

## Research Methodology

The exploratory research was applied in this research. The research methodology followed the logical chain:

- Exploration of the topic in Phase 1,
- E-course construction in Phase 2,
- E-course implementation in Phase 3, and
- E-course evaluation in Phase 4.

The exploratory empirical study was implemented in 2022-2023.

The empirical study was enabled by the research question: What is the e-course evaluation by e-course trainers, e-course participants, and experts?

The sample was composed of six e-course trainers, 15 e-course participants, and two experts from two different countries.

The empirical study was built on the triangulation method referred to data collection (Zaščerinska, 2013). The method of triangulation means that the data were collected from the three different sources:

- From the e-course trainers,
- From the e-course participants, and
- From experts.

The methods of data collection were an online survey for the e-course participants, focus group interview with the e-course trainers, and semi-structured interviews for the e-course experts. The data from the online survey were analysed via the descriptive statistics with the use of mean and frequency analysis as well as ranking (Ahrens & Zascerinska, 2020), while from the semi-structured interviews – via content analysis. It should be noted that, on the one hand, ranking refers to a course evaluation used for the advancement of the evaluated course (Ahrens & Zascerinska, 2020), and, on the other hand, ranking tends to emphasise vertical differences between the options or candidates (Marginson & van der Wende, 2007). Thereby, there is the triangulation of the methods for data analysis, too. Table 1 summarizes the use of the triangulation methods in the present work.

*Table 1 Summary of the use of the triangulation methods in the present work (the authors)*

Nr.	Triangulation methods in data collection	Triangulation methods in data analysis
1.	Focus group interview with the e-course trainers	Mean analysis
2.	Online survey for the e-course participants	Frequency analysis
3.	Semi-structured interviews with the e-course experts	Ranking

*Source: The COMSUS project.*

The present work is based on the leverage of the triangulation method from the data collection aspect as well as the data analysis perspective. The use of the

triangulation method means the synthesis of the data, information, and knowledge obtained from different sources and aimed at testing the research results' validity.

The data were analysed and interpreted by the researchers who carried out the present work (Ahrens, Purvinis, Zaščerinska, Micevičienė, & Tautkus, 2018).

## **Research Results**

For the enrichment of HEIs teaching staff competence in sustainable communication of higher education institutions in social media, the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” (<https://cursos.lusofona-x.pt/courses/course-v1:LusofonaX+COMSUS+00/course/>) was created by the COMSUS (“Development of sustainable communications of higher education institutions in social media”) project members (<https://comsus.eu>) in 2022. The e-course was based on the new development model of sustainable communication. The new development model of sustainable communication implies that the sender and the receiver simultaneously communicate with each other (Ahrens et al., 2023). The information provided by the sender and the receiver meets, interacts, and enriches (Ahrens et al., 2023).

The aims of the e-course “The power of social media in the professional development of teachers: personal brand tools for educational products promotion of sustainable development values” are to rise HEIs' teaching, staff academic and scientific staff awareness-raising about environmental and climate change challenges, develop skills in social media marketing as an instrument of personal brand development, a tool for educational products, promotion of sustainable development values.

The methodology of the e-course is based on the European Sustainability Competence Framework (European Commission, 2022). The e-course fosters a sustainability mindset by helping users develop the knowledge, skills and attitudes to think, plan and act with empathy, responsibility, and care for our planet (European Commission, 2022).

The e-course uses European Sustainability Competence Framework, GreenComp, as a reference framework for sustainability competences (European Commission, 2022), because GreenComp:

- Provides a common ground to learners and guidance to educators, ensuring a consensual definition of what sustainability as a competence entails;
- Is designed to support education and training programs for lifelong learning;
- Is written for all learners, irrespective of their age, education level and in any learning setting – formal, non-formal and informal;

- Shows a general reference model that everyone involved in lifelong learning can use to design learning.

The e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” consists of five Modules:

1. Social media inspirational campaigns.
2. Building of Personal brand of university teachers through social media.
3. Social media tools for education.
4. Promotion of sustainable development values through social media.
5. Social media in decision making: becoming a change maker and an influencer.

Each module has a focus on three main points:

1. Module: Social media inspirational campaigns:
  - A social media campaign for HEI social media marketing strategy.
  - Creation of ideas for social media inspirational campaigns.
  - Specific outcomes in social media inspirational campaigns that can be tracked and measured over a specific period of time.
2. Module: Building of Personal brand of university teachers through social media:
  - Social media impact on academic identity (mental health) construction.
  - Building a personal brand on social media.
  - Promotion of personal brand in social media.
3. Module: Social media tools for education:
  - Social media as an educational tool.
  - Social media platforms.
  - Social media for networking with key stakeholders.
4. Module: Promotion of sustainable development values through social media:
  - Impact of social media on sustainable development and 17 sustainable aims: green and digital transition, diversity, equity and social inclusion, cultural identity and others.
  - Social media for diversity, equity and social inclusion.
  - Social media impact on cultural identity construction.
5. Module: Social media in decision making: becoming a change maker and an influencer:
  - Social media: gatekeeper, decision maker, champions, influencer and influencer blocker.
  - Etiquette as important factor for partnership building with followers.
  - Ethics in social media.

Each Module includes:

- List of main questions to study,
- Curriculum (learning outcomes, description of content, teaching methods, resources, duration);
- Training contents;
- Teaching methodology for online training.

The e-course dedicated to HEIs' teaching academic and scientific staff have a total duration of 20 hours:

- 15 hours of group study, and
- 5 hours of independent work of learners.

The e-course is structured in modules and units.

Each unit is planned for

- 3 hours of group study, and
- 1 hour of independent work of learners.

The e-course was also followed by a Handbook created for the e-course trainers.

The implementation of the e-course started in July 2023. The e-course was implemented in selected European countries, namely Germany, Poland, Portugal, Turkey, and Ukraine. All these countries are the COMSUS project members. The e-course was implemented with the HEIs teaching staff in the English language.

After the pilot of the e-course, a focus group interview with six e-course trainers was organised in December 2023. All the e-course trainers agreed that the e-course is a success. The trainers stressed that the strengths of the e-course are

- Interesting and modern e-course content,
- Logical and sequential composition of the e-course, and
- User-friendly platform where the e-course is made available.

The analysis of the e-course evaluation by the six e-course trainers allows summarizing that the e-course was positively evaluated by the e-course trainers.

After the pilot use of the e-course, the 15 e-course participants in Germany filled in the online survey. For Questions 1-5 of the online survey, the 5 point Liker scale was used for measuring. Table 2 presents the overview of the survey results.

*Table 2 Summary of the participants' survey results (the authors)*

Survey Question	Mean	Ranking
How would you rate the structure of the e-course?	4.8	1
How would you rate the content of the e-course?	4.6	2
How would you rate the length of the e-course?	4.6	2
How would you rate the exercises?	4.6	2
How would you rate the level of difficulty of the e-course?	3.8	3

Source: The COMSUS project.

n=15

The results of the open-end question “What did you like most about the course?” are shown in Table 3.

**Table 3 Summary of the participants’ survey results about the e-course strengths**  
(the authors)

E-course characteristics	Frequency	Ranking
1. Topic depth	8	1
2. Interesting	1	4
3. Practical	5	2
4. E-course	1	4
5. E-course flow	4	3
6. Interactive	1	4

Source: The COMSUS project.

n=15

The results of the open-end question “What could be improved?” are shown in Table 4.

**Table 4 Summary of the participants’ survey results about the e-course updates needed**  
(the authors)

E-course characteristics	Frequency	Ranking
1. Nothing	13	1
2. To organise the real online meetings with some influencers who can share knowledge about the course	1	2
3. more explanations and videos in particular topics	1	2

Source: The COMSUS project.

n=15

The results of the open-end question “Did you encounter any problems?” are shown in Table 5.

**Table 5 Summary of the participants’ survey results about the e-course updates needed**  
(the authors)

E-course characteristics	Frequency	Ranking
1. No	12	1
2. Problems with receiving a certificate for completion of the e-course	3	2

Source: The COMSUS project.

n=15

Table 6 summarizes the Top 3 features, strengths, and weaknesses of the e-course based on the analysis of the online survey for the e-course participants.

**Table 6 Summary of Top 3 features, strengths, and weaknesses of the e-course (the authors)**

Nr.	Features	Strengths	Weaknesses
1.	Structure	Topic depth	Certification on the e-course completion
2.	-Content -Length -Exercises	Practicality	-
3.	Level of difficulty	E-course flow	-

Source: *The COMSUS project.*

The analysis of the e-course evaluation by the 15 e-course participants allows summarizing that the e-course was positively evaluated by the e-course participants.

Finally, a semi-structured interview was organised with two experts in November 2023. One expert was from Portugal, the other was associated with Turkey. The experts were interviewed separately. Both experts found the e-course interesting and useful. Mostly their comments referred to some text organisational aspects such as the use of bullet point or full sentences in the text of the e-course, and similar. Overall, the e-course is positively evaluated by two experts.

Table 7 summarizes the e-course evaluation by trainers, participants and experts of the e-course.

**Table 6 Summary of e-course evaluation by trainers, participants, and experts (the authors)**

Category	Trainers	Participants	Experts
Number of respondents	six	15	two
Evaluation	Positive	Positive	Positive

Source: *The COMSUS project.*

*n=23*

The application of the triangulation method to the obtaining the final evaluation of the e-course allows finding that the e-course was positively evaluated by trainers, participants, and experts.

## Discussion

There is an urgent need in developing and updating any subject courses in general and e-courses in particular with linkages to sustainable development in general and the just green transition towards climate neutrality in particular. This would help connect HEIs with stakeholders from different business companies, governmental institutions, youth organisations, NGOs, etc to ensure sustainable development of HEIs and other organisations. Currently, such courses and e-course are emerging and are under construction. Integration of the content related to the just green transition towards climate neutrality into courses show the high-

priority need in educators training to integrate sustainability into education and training (European Commission, Joint Research Centre, GreenComp, 2022).

Literature analysis shows that there is no clear understanding of the two terms, namely sustainability communication and sustainable communication. The difference between these two terms was proposed as a process for sustainable communication and process result for sustainability communication (Ahrens et al. 2023).

## **Conclusions**

HEIs sustainable communication in social media is attracting more attention from the theorists, practitioners, learners, and stakeholders. HEIs sustainable communication in social media is beneficial for all the involved as it supports just green transition, e.g. by lowering the carbon emissions by, for example, commuters, aimed at reducing climate impact and mitigating climate change.

The literature analysis allows concluding that sustainability communication in social media is still under-estimated by higher education institutions as this topic is under-explored.

The empirical study allows drawing a conclusion that the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” for HEIs teaching staff was positively evaluated by the e-course trainers, the e-course participants, and the e-course experts.

The use of the triangulation method for the data collection and analysis allows considering that the researchers’ conclusions on the positive evaluation of the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” for HEIs teaching staff is valid.

The positive evaluation proposes that the e-course “The power of social media in the professional development of teachers: personal brand, tools for educational products, promotion of sustainable development values” for HEIs teaching staff is effective and efficient.

The present research is limited by the number of published scientific works on the topic of HEIs sustainable education in social media. Another limitation is the number of respondents who take part in the online survey, focus group interview and semi-structured interviews. A limitation also refers to the European countries in which the e-course was implemented. The leverage of the e-course was also limited by its availability only in the English language. Thereby, translation of the e-course teaching and learning materials into other languages would help increase the number of the e-course participants.

Further work tends to increase the number of respondents in each of the group, namely e-course trainers, e-course participants, and experts. Involvement



of more European countries into the empirical study is proposed. Comparative studies of different countries are intended as well.

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# MŪSDIENU PROJEKTU VADĪBA UN TĀS PIEVIENOTĀ VĒRTĪBAS IZGLĪTĪBAS IESTĀDĒ

## *Contemporary Project Management and its Added Values in Educational Institutions*

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**Abstract.** *In the field of education, with the advancement of cutting-edge technologies and the emergence of new challenges and solutions in the education sector, coupled with increasing globalization, competition, personal ambitions, new ideas are increasingly emerging, and opportunities for their realization are sought. Professional and successful project management facilitates the development of new ideas, their implementation in both public and private sector educational institutions. To achieve the goals set in the project, it is essential to determine the core values that should be adhered to throughout the process. The parties involved in the project need to understand what the project is, its elements, the process to achieve desired results, the risks involved, who the project manager is, and his team, among others.*

*The core values in projects implemented in educational institutions may vary depending on the industry in which the project is implemented, the project's goals, and implementation methods. However, there are some fundamental values that the author of the article would like to highlight - development and growth, fairness and objectivity, equality, initiative and creativity, taking responsibility, honesty, moderation, diligence, and solidarity.*

*The management of educational institutions, the organization of teaching, and the preparation of teaching materials using modern development, digitization, and competency approaches are becoming more relevant. Therefore, a systematic approach, which can be provided through project implementation, is a suitable solution. The principle of continuous improvement is fundamental to any of the approaches to managing an educational institution, regardless of whether the education system is being developed in public or private educational institutions.*

*Currently, amidst unstable political situations and widely available forms of support (grants, donations, capital discounts, etc.), Latvia is once again facing new challenges in economic development. Projects are one of the tools that can be used to implement ideas or improve the knowledge, capacity, skills, and competencies of educational institution staff, among other things.*

*The aim of the article is to explore the core values of project implementation, describing European Union Special Support (hereinafter - SAM) projects, identifying the benefits to educational institutions, and drawing conclusions about the added value of projects in the operation of educational institutions.*

**Keywords:** *core values, project management, project management implementation methods.*

## **Ievads** ***Introduction***

Katras izglītības iestādes, kur tiek iegūta augstākā izglītība, uzdevums ir studiju programmas izstrāde, īstenošana un tās nepārtraukta pilnveide. Mūsdienu pārmaiņu laikā studiju programmu pilnveidei, kā arī šo programmu mācību metožu uzlabošanai, tiek pievērsta aizvien lielāka uzmanība. Ar dažādu projektu īstenošanu tiek panākta arī programmu īstenošanas pilnveide, paaugstināta izglītības iestādes darbinieku un tās mācībspēku izpratnes attīstība, dodot iespēju plašāk skatīties uz katru jautājumu un uzdevumu, kas jāveic konkrētajai iestādei.

Izstrādājot studiju programmas, to stratēģisko ietvaru, būtiski izpētīt nozares, patērētāju, potenciālo studentu vajadzības, pieprasījumu. Katrai augstskolai ir izstrādāta sava stratēģija ar atbilstošiem studiju programmu mērķiem, studiju rezultātiem, kas noteikti, ņemot vērā profesionālās kompetences kritērijus. (Doniņa, 2020).

Attīstoties informācijas tehnoloģijām, zināšanām par kvalitatīvu, mūsdienām atbilstošu mācību pieeju, kā par galvenais augstākās izglītības mērķis tiek izvirzīts nosacījums – īstenot studējošo sagatavošu darba tirgum (Cranmer, 2006).

I. Amoliņa, izpētot pamatvērtības projektos ir izcēlusi tādas pamatvērtības kā attīstība un izaugsme, taisnīgums un objektivitāte, vienlīdzība, iniciatīva un kreativitāte, atbildības uzņemšanās, godīgums, mērenība, centība un solidaritāte (Amoliņa, 2023).

Piemērojot šīs dažādās pamatvērtības izglītības iestāžu projektos, tiek palielināta pievienotā vērtība visai iestādes darbībai, īstenojamajām studiju programmām, palielināta resursu efektivitāte, stiprinot ekonomiski, sociāli, tiesiski un ekoloģiski ilgtspējīgas darbības.

Mūsdienās, attīstot tajā skaitā projektus izglītības iestādēs, neatņemams faktors ir ilgtspējība. Pieaugošā ilgtspējas nozīme ir vēl vairāk palielinājusi projektu īstenošanas organizatorisko un tiesisko sarežģītību un līdz ar to arī projektu vadību (Silvijs, Schipper, 2014), un to ieviešana palielina personāla un arī pašu studējošo vēlmi attīstīties, drosmi īstenot jaunus, kreatīvus procesus, izmantot jaunākās metodes un palielina prasmi profesionāli izvērtēt mācību procesus un izglītības iestādi kā vienu veselu kopumu un tajā pat laikā izvērtēt studiju procesu rezultātus. Profesionāli strādājot ar pieejamo informāciju, izglītības iestādes vadība, studiju programmu īstenošana, pilnveide un pārraudzība kļūst vienkāršāka. Projektu vadība un tās pievienotā vērtība šajā gadījumā būs kā daļa no organizatoriskās struktūras, ieviešot dažāda veida procedūras, procesus, izmantojot gan pašu gan ar projektu palīdzību piesaistītos līdzekļus, lai īstenotu augstas kvalitātes studiju programmu īstenošanu.

Kopumā secināms, ka projekti ir cilvēku, procesu un resursu organizēšana ar noteiktu mērķi, identificētiem sasniegšanas indikatoriem (Lockett et al., 2008).

Šobrīd, kad ir plaši pieejami dažādi atbalsta veidi (grantu, dāvinājumi, kapitāla atlaides u.c.), Latvija sastopas ar jaunu attīstības izaicinājumu arī izglītības jomā. Līdz ar ko projekti ir viens no instrumentiem, ko var izmantot, lai ieviestu savas idejas vai arī uzlabotu savas zināšanas, kapacitāti, dzīves apstākļus u.c. Plaši pieejamais Eiropas Savienības atbalsts ir lieliska iespēja uzlabot izglītības iestādēm savu profesionalitāti, konkurētspēju, sasniegt mazināt nevienlīdzību, attīstīt digitālo transformāciju (mākslīgais intelekts, straumēšanas pakalpojumi u.c.) un veicināt izglītības attīstību kopumā. Latvijā izglītības iestādēm ir iespēja izmantot Eiropas Sociālā fonda atbalstu augstākajai izglītībai, zinātnei, profesionālajai izglītībai, vispārējai izglītībai, mūžizglītībai un Eiropas Ekonomikas zonas un Norvēģijas finanšu instrumenta atbalstu.

Atbalstāmās aktivitātes ir saistītas gan ar neliela mēroga projektiem, ar nelielu skaitu uzdevumu, gan ar liela mēroga, tajā skaitā starptautiskiem projektiem, kuri tiek īstenoti starp Eiropas universitātēm, profesionālās izglītības centriem, kā arī *Erasmus* + skolotāju akadēmijām. 2023.gadā izglītības sektoros kopumā apstiprināti 254 mobilitātes projekti 23,97 miljoniem eiro vērtībā, kuros 9424 pārstāvji no dažādiem skolu, profesionālās, augstākās un pieaugušo izglītības sektoriem varēs apgūt zināšanas un pieredzi ārvalstīs. Šo procesu gaitā projektu dalībniekiem iespēja apmeklēt dažāda veida kursus, novērot procesus, piedalīties pieredzes apmaiņas pasākumos, piedalīties nodarbībās kā docētājam, stažēties uzņēmumos, iziet praksi kādā valstī vai arī sniegt būt pretējā pusē: kā pavadošās personas, sniedzot atbalstu.

Projekts pēc savas būtības ir kādas secīgi izplānotas un īstenotas darbības rezultāts, kurš ierobežots noteiktā laika posmā, ar ierobežotiem resursiem un konkrētu mērķi. Šie mērķi var būt dažādi (Amoliņa, 2023). Ieviešot projektus izglītības iestādē, nepieciešams katram projektam noteikt mērķi, kas jāsasniedz tam uzstādītajā laikā (pieredzes apmaiņa, kapacitātes celšana, jaunu prasmju apgūšana u.c.). Mērķus svarīgi izvirzīt, lai jau sākumā saprastu, kam projekts tiks īstenots un kam domāts būs tā gala rezultāts. Katram no noteiktajiem rezultātiem jāsasniedz sava noteiktā pozīcija un jābūt sakārtotiem pa ķēdes posmiem.

Raksta mērķis ir izpētīt projektu īstenošanas pamatvērtības, raksturojot Eiropas Savienības speciālā atbalsta (turpmāk – SAM) projektus, noskaidrojot izglītības iestāžu ieguvumus un izdarot secinājumus par projektu pievienoto vērtību izglītības iestādes darbībā. Izpētīt projektus un to pamatvērtības, tiek izdarīti secinājumi par projektu pievienoto vērtību izglītības iestādes darbībā.

Veicot pētījumu tiks izmantotas tādas pētījumu metodes kā literatūras apskats (literature review), noskaidrojot teorētiskās pamatnostādnes par projektu vadību, kvalitatīvā aptaujas metode un kvantitatīvās metodes, veicot aptaujas gaitā iegūto datu analīzi, piemērojot vidējo svērto metodi un Pearson korelācijas analīzes metode.

## **Projektu vadības pamatprincipi** *Basic principles of project management*

Projektu vadība kā pasākumu ietver virkni ar dažādiem procesiem, tajā skaitā ideju ģenerēšana, plānošana, realizācija, vadība, motivēšana, ražošana, aktivitāšu organizēšanas un resursu uzraudzības darbību kopums, kvalitātes kontrole, risku un finanšu vadība, lai rezultātā tiktu sasniegts projektā izvirzītais mērķis un sasniedzamie rezultāti.

Lai projekts būtu dzīvotspējīgs, tā mērķis un sasniegtais rezultāts tiktu izmantots ilgākā laika periodā, tiek likts uzsvars uz ilgtspējību. Lai panāktu, ka projekts būtu raksturots kā ilgtspējīgs, jānodrošina projektu īstenošanas, realizācijas, digitalizācijas, dokumentu pārvaldības un dažādu citu atbalsta procesu plānošana, realizācija, uzraudzība un kontrole, kur ir tādi kritēriji kā vides, ekonomiskie un sociālie aspekti. Mērķis ir panākt kā labuma guvējs ir tiešā un netiešā katra projekta mērķauditorija un visi projekta posmi tiek īstenoti caurspīdīgā, taisnīgā un sociāli atbildīgā veidā, kas ietver kopienas, ieinteresēto pušu aktīvu darbošanos (Eskerod & Huemann, 2013).

Katru projektu raksturo noteikts laiks (sākuma un beigu), noteikts un ierobežots budžets, precīzi definēts mērķis un virkne ar aktivitātēm mērķa sasniegšanai (Gareis, 2004).

Prognozes liecina, ka tuvākajos gados Latvijā būs profesionāla un augsti kvalificēta (galvenokārt ar koledžas vai augstāku izglītības līmeni) darbaspēka nepietiekamība, zemo sabiedrības kapacitāti digitālo pakalpojumu izmantošanā un mūsdienīgu kompetenču trūkumu kopumā. Tas novedīs pie tā, ka būs nepietiekams kvalificētu speciālistu skaits, piemēram, informācijas tehnoloģiju, dabas un inženierzinātņu jomās (visos izglītības līmeņos). Jau tagad ir jādomā kā nodrošināt augsti kvalificētu speciālistus nākotnē, kur būtu attīstītas tādas spējas, zināšanas un prasmes kā tehniskā specializācija, digitalizācija, sociāli atbildīga un ilgtspējīga uzņēmējdarbība.

Mūsdienu mainīgajā augstākās izglītības vidē, liela daļa izglītības iestāžu procesu, iniciatīvu un pārmaiņu tiek īstenotas projektu veidā. Tas nozīmē, ka ikvienam no šīs vides būtu jābūt izpratnei par galvenajām projektu vadības teorijām, metodēm, lai varētu noteikt labākās pieejas, metodes attiecībā uz visu izglītības procesu, struktūru, plānošanu, īstenošanu un uzraudzību.

Veiksmīga projekta virzība ir atkarīga gan no atbilstoši izvēlētas vadības metodes, gan no projektā iesaistīto pušu kompetences, motivācijas, projekta komandas, ieinteresēto pušu savstarpējas sadarbības, precīzi noteiktiem mērķiem un no tā izrietošām pamatotām aktivitātēm, kā arī no pamatvērtībām, kuras tiek ievērotas visā projektu vadības procedūrā (Amoliņa, 2023).

Plānojot projektu, būtiski piedomāt vai plānotie indikatori būs mūsdienīgi, tajā skaitā pielietojot inovatīvas procesu metodes, lai varētu sasniegt plānoto mērķi, definētos indikatorus, kā piemēram, ja tiek uzsākta jauna studiju

programma – vai tiks izmantotas jaunākās inovatīvās mācību metodes, vai tiks nodrošināta piekļuve informācijai, tiešsaistei un dažāda veida e risinājumiem studiju programmu īstenošanā. Kopumā tas viss veido pievienoto vērtību.

Mūsdienīga projektu vadība nozīmē, ka procesu vadībā ievēro resursu ierobežojumu, izmantojot sistēmisku pieeju, lai efektīvi pārvaldītu visas ar projektu saistītās aktivitātes, kas nozīmē vadību ar visu plānošanas, organizēšanas, vadīšanas, koordinēšanas procesu, kontrolējot un novērtējot no projekta idejas līdz tā noslēgumam, lai sasniegtu projekta mērķi (Amoliņa, 2023).

Kā viena no pievienotajām vērtībām, īstenojot projektus, ir paaugstinās augstākās izglītības iestādes darbības un tās īstenoto studiju programmu kvalitāte.

Diskusijas par kvalitātes aspektiem izglītības iestādēs ir vienas no visvairāk diskutētajām tēmām starp dažādu jomu personām – gan starp izglītības darbiniekiem, gan darba devējiem, gan pašiem studentiem. . Pieaugot prasībām par kvalitātes līmeni mācību nodrošināšanā, koledžām, augstskolām un universitātēm ir jādomā kā sāk izmantot jaunus, mūsdienīgus, tajā skaitā iekļaujošās izglītības risinājumus. Problēmas rada apstākļi, ka ir principiāli pretējs viedoklis, kas definē izglītības kvalitāti, bet izglītības iestāžu ikdienā to atbalsta personālam nākas saskarties ar tirgus ekonomikas principiem jārisina ekonomiska, finansiāla rakstura jautājumi. t.t. tajā pat laikā izglītības iestāde darbojas kā „sabiedriski pakalpojoša dimensija”, no kā secināms, ka tām ir jāapmierina dažādu ieinteresēto pušu vēlmes (Grinpauks, 2002).

Kvalitatīva atgriezeniskā saite ir viens no būtiskiem pamatprincipiem, kas tiek raksturots kā viena no pievienotajām vērtībām, jo projekta realizācijā iesaistītās puses ir tikai neliela daļa no visas izglītības iestādes, savukārt ievērojot šo pamatprincipu, iegūtie rezultāti tiek pārnesti tālāk iestādes iekšienē un iegūtie rezultāti tiek izmantoti visas iestādes darbības gaitā.

Ja projekts tiek īstenots ar mērķi – paaugstināt mācībspēku spējas, prasmes, mācību metodes, panākt mūsdienīgāku augstākās izglītības pieejamību un attīstīt starptautisko dimensiju, palielināt absolventu konkurētspēju darba tirgū, tādējādi atšķiroties no konkurentiem, tiek izmantota zilā okeāna stratēģija, kur minēti tādi principi kā formulēšanas princips: nišas robežu pārbūve; koncentrēšanās uz kopainu, nevis skaitļiem; sniegšanās ārpus esošā pieprasījuma; pareizā stratēģiskā secība un īstenošanas princips: galveno organizatorisko ierobežojumu pārvarēšana; izpildes ieviešana stratēģijā (Čans, Mauborgne, 2008).

Kā norāda zinātnieki, kuri pētījuši projektu vadības pamatprincipus, svarīga ir projekta tehnika, izvēlētās metodes, tajā skaitā procesa nepārtrauktība projekta īstenošanas laikā, saturs un kvalitāte (Shamim, 2022).

Projekta realizācijas gaitā ir svarīga indivīda izaugsmes, attīstības un prasmju attīstības iespējas, ievērojot projektā paredzēto mērķi, aktivitātes, kā arī spriedzes trijstūra pamatnosacījumus un riskus. Izglītības iestāžu līdzsvarotas un mūsdienīgas attīstības veicināšanai ir būtiski īstenot dažāda veida projektus, tādējādi sekmējot mūsu visas izglītības sistēmas straujāku attīstību un

konkurētspējas pieaugumu. Būtiski izmantot arī tās iespējas, ko sniedz Eiropas savienības līdzfinansētie projekti, tajā skaitā sadarbības iespējas, izmantojot esošās un attīstot jaunas tīklošanas platformas.

### **Projektu vadības pamatvērtības un to raksturojums** *Basic values of project management and their characteristics*

Lai sabiedrība būtu apmierināta ar izglītības kvalitāti un pieejamību, augstākās izglītības iestādēs jāattīsta izglītība, kas ietver modernu, mūsdienīgu kompetenču attīstību, attīstot augstas pievienotās vērtības amatu pratību, saderību starp nozares pieprasījumu un izglītības iestādes mācību procesiem, globālo zināšanu ieguvī, attīstot ilgtspējīgu izglītības sistēmu, iekļaujot iekļaujošas izglītības pamatprincipus, kā arī caur proaktīvu un zināšanu un kompetenču piedāvājumu panākt sabiedrības analītiskās un absorbcijas kapacitātes celšanu.

Viena no lietām, kam jāpievērš uzmanība ir pamatvērtības, kuras tiek ņemtas vērā projekta īstenošanas procesā. Izpratne par pamatvērtībām sākas jau ar to brīdi, kad definējam projekta mērķi un veicamās aktivitātes. Nosakot pamatvērtības jāprot atbildēt uz jautājumu: “Kāpēc tieši šīs vērtības ir svarīgas, kādēļ tieši tām tiek dota priekšroka?” (Amoliņa, 2023). Raksta autore savā pētījumā izmantos daļu no I. Amoliņas pētījumā izceltajām pamatvērtībām, kā arī papildinot šo sarakstu ar pamatvērtībām, kas būtu raksturīgas tieši izglītības iestādēm.

Raksta autore izcels 8 pamatvērtības, kuras projektu vadībā ieņem noteiktu vietu:

1. Attīstība un prasmes.
2. Taisnīgums un objektivitāte.
3. Vienlīdzība.
4. Iniciatīva.
5. Kreativitāte.
6. Atbildības uzņemšanās.
7. Orientācija uz rezultātu sasniegšanu.
8. Kritiskā domāšana

Lai attīstība un izaugsme tiktu noteikta kā pamatvērtība, ir vērts ieskatīties, ko paredz Latvijas ilgtspējīgas attīstības stratēģija 2030.gadam. Projekta pamatā vienmēr būs kādas problēmas risināšana vai vajadzību apmierināšana, un lai šie risinājumi būtu atbilstoši mūsdienu prasībām, ir jāievēro jaunākās iespējas, un jāievieš praksē. Attīstība ilgtermiņā atkarīga no darba ražīguma pieauguma, no investīciju līmeņa fiziskajā kapitālā, cilvēkkapitālā un pētniecībā (Amoliņa, 2023). Spējas un prasmes var interpretēt un pielietot ļoti plaši, atbilstoši amata funkcijām, izglītības iestādes stratēģijai. Zinātniskajā literatūrā prasmes tiek iedalītas speciālajās jeb profesionālajās (tehniskie parametri, lai veiktu dažus uzdevumus darbā, izmantojot esošās zināšanas) un vispārējās (sadarbība,

komunikācija, līderība, konfliktu vadību, spēju diskutēt, un ētiku) (Doniņa, 2020). Kā būtiskākie attīstības un prasmju ieguvumi ir izaugsmes iespēju, prasmju, zināšanu, pieredzes, kompetences un spēju uzlabošana.

Taisnīgums ir viena no mūsdienu sabiedrības, tajā skaitā izglītības iestāžu pamatvērtībām.

Taisnīgums nozīmē objektivitāti, interešu izsvēršanu un līdzsvarotību, piešķirot katrai atbilstošu svaru (Bārdiņš, 2016). Taisnīgumu raksturojas kā rakstura īpašību kopums un domāšanas veids, kas integrējas dažādu faktoru ietekmē: ģimenē, izglītības iestādē, sabiedrībā, valsts un personu savstarpējās attiecībās (Krūmiņa, 2022). Objektivitāte ir būtiska gan projektu vadības visos posmos, gan arī šī attīstītā prasme “būt objektīviem” ieņem būtisku lomu mācībspēkiem darbā ar studējošiem.

Vienlīdzība nozīmē, ka vienādos faktiskajos un tiesiskajos apstākļos, pret personām ir jāizturas vienādi, savukārt atšķirīgos apstākļos izturēšanās ir būs atšķirīga. (Levits, 2016).

Iniciatīva ir viens no virzītājspēkiem, lai īstenotu jaunas idejas, aktivitātes, pārmaiņas. Kā viena no aktuālākajām šī brīža iniciatīvām tiek atbalstīti tādi projekti, kuru mērķis ir stiprināt izglītības iestāžu digitālo kapacitāti, ieviešot vienotas koplietošanas digitalizācijas iniciatīvas, panākot studiju kvalitātes pilnveidi.

Kreativitāte tiek raksturota kā indivīda spēja domāt radoši, attīstot jaunas pieejas, metodes, idejas. Kreativitāte kā patvērtība ir sastopama gan radošajos projektos, gan pašās izglītības iestādēs, kuras veicina šīs pamatvērtības ieviešanu savā darbībā. Protams, tas būs vairāk novērojams tajās iestādēs, kur izglītību iegūst dažādu mākslas jomu studenti (aktiermāksla, glezniecība u.c.), tomēr aizvien vairāk to var konstatēt arī tādās studijās kā arhitektūra.

Atbildības uzņemšanās projektos ir saistīta ar pienākuma apziņas līmeni veikt savas funkcijas ar augstu atbildību, ievērojot visas prasības (gan normatīvo aktu regulējums, gan uzstādītie standarti, rādītāji, produkta vai pakalpojuma izstrādei)(Amoliņa, 2023).

Orientējoties uz rezultātu sasniegšanu, tiek izvirzīti mērķi, un mērķtiecīgi un tiesiski pildot paredzētās aktivitātes, sasniegtu iecerēto. Šajā procesā būtiska ir arī prasme identificēt faktus, novirzes, analizēt datus, procesus un novērtēt iestādes attīstību tās stratēģijai (Vintiša, 2011).

Kritiskās domāšanas piemērošana pasaules globalizācijas laikmetā ir ļoti būtiska. Digitalizācijas attīstības rezultātā pieaug pieejamās informācijas apjoms, dažādība un kvalitāte. Kritiskā domāšana ir spējas izanalizēt informāciju, kā arī demokrātijai būtiska tradīcija, kad tiek īstenota argumentēta diskusija (Kūle, 2008).

Globālā konkurence starp izglītības iestādēm šobrīd Latvijā ir ļoti augstā līmenī. Tehnoloģijas virzās uz priekšu neparedzētā tempā. Izglītības iestādēm ir jāspēj tikt līdzī pārmaiņām, jāsniedz vairāk kā sākotnēji plānots, izmantojot



mazākus resursus. Lai gan risinājuma nav, tomēr projektu vadība var dot ievērojamu pievienoto vērtību gan pašām iestādēm, gan tur strādājošajam personālām.

### **SAM projektu augstākajā izglītībā raksturojums** *Characteristics of SAM projects in higher education*

Laika periodā no 2014. – 2020. augstākajā izglītībā tika realizēti astoņi SAM projekti, aptverot visdažādākās jomas. No tiem darbības programmā “Izaugsme un nodarbinātība” prioritārā virziena “Izglītība, prasmes un mūžizglītība” seši specifiskā atbalsta mērķi tika vērsti uz uzlabojumiem augstākajā izglītībā: 8.1.1. SAM “Palielināt modernizēto STEM, tajā skaitā medicīnas un radošās industrijas, studiju programmu skaitu”; 8.1.4. SAM “Uzlabot pirmā līmeņa profesionālās augstākās izglītības STEM, t.sk. medicīnas un radošās industrijas, studiju mācību vidi koledžās”; 8.2.1. SAM “Samazināt studiju programmu fragmentāciju un stiprināt resursu koplietošanu”; 8.2.2. SAM “Stiprināt augstākās izglītības institūciju akadēmisko personālu stratēģiskās specializācijas jomās”; 8.2.3. SAM “Nodrošināt labāku pārvaldību augstākās izglītības institūcijās”; 8.2.4. SAM “Nodrošināt atbalstu EQAR aģentūrai izvirzīto prasību izpildei”. 8.2.1. SAM intervence ir cieši saistīta ar pārējiem pieciem SAM, un tā ietekme uz izglītības jomu – uzlabota augstākās izglītības kvalitāte un konkurētspēja, skatāma visu saistīto SAM kontekstā.

Izglītības attīstības pamatnostādņēs 2014.–2020. gadam kā viens no uzdevumiem tika noteikts augstākās izglītības institūciju resursu mērķtiecīga izmantošana. Arī Latvijas Viedās specializācijas stratēģijā kā viena no izaugsmes prioritātēm ir izvirzīta moderna un nākotnes darba tirgus prasībām atbilstoša izglītības sistēma, kas veicina tautsaimniecības transformāciju un Latvijas Viedās specializācijas stratēģijā prioritāšu īstenošanai nepieciešamo kompetenču, uzņēmējspējas un radošuma attīstību visos izglītības līmeņos. Lai īstenotu Latvijas Viedās specializācijas stratēģijā izvirzītos mērķus, ir jāattīsta cilvēkkapitāls, kas realizēs pakalpojumu sniegšanu vai preces ražošanu, nodrošinās izaugsmi nozarēs, radot produktus un pakalpojumus ar augstu pievienoto vērtību, ar nozīmīgu horizontālo ietekmi un ieguldījumu tautsaimniecības transformācijā, kā arī mainot ražošanas un eksporta struktūras tradicionālajās tautsaimniecības nozarēs. Latvijas augstskolas un koledžas ieņem svarīgu vietu šo mērķu sasniegšanā, jo šīs izglītības iestādes veido Latvijas cilvēkkapitālu un uzņēmumu inovāciju spēju, rada zināšanas par sabiedrībai svarīgiem jautājumiem.

Lai īstenotu mūsdienu un ilgtspējīgu studiju procesa īstenošanu izglītības iestādēs, kurs būtu cieši saistīts ar tautsaimniecības attīstību un tai definētajiem mērķiem un publisko ieguldījumu prioritātēm, investīciju ieguldījumi augstskolu un koledžu studiju un zinātniskā darba infrastruktūras modernizēšanai ir cieši

saistīti ar dažādu ES projektu piesaisti, tā ES fondu 2014. – 2020.gada plānošanas periodā nepieciešamo līdzekļu piesaiste un projektu izstrādes tika vērtētas kopumā ar darbaspēka piedāvājumu un pieprasījumu, patērētāja izvēles brīvību un gribu, tai skaitā reģionālā griezumā.

Specifiskā atbalsta mērķa 8.1.1. „Palielināt modernizēto STEM, tajā skaitā medicīnas un radošās industrijas, studiju programmu skaitu” (turpmāk – 8.1.1. SAM) ietvaros plānoja sniegt atbalstu teritoriāli koncentrētas studiju un zinātniskā darba infrastruktūras attīstībai augstākās izglītības institūciju stratēģiskās specializācijas stiprināšanai, t.sk. ēku vai telpu pārbūvei vai atjaunošanai, jaunas ēkas būvniecībai, iekārtu un aprīkojuma iegādei, ēku un telpu pielāgošanai aprīkojuma un aparatūras uzstādīšanai un darbībai, kā arī plānoja piešķirt atbalstu informācijas un komunikācijas tehnoloģiju risinājumiem, t.sk. tālmācības rīku, programmatūras, bibliotēku resursu iegādei, STEM, t.sk. medicīnas un radošās industrijas, studiju virzienos.

Šim projektam tika noteikta ierobežota projektu iesniegumu atlase, kurā jau tika nedefinētas konkrētās augstākās izglītības iestādes: Daugavpils Universitāte; Jāzeps Vītols Latvijas Mūzikas akadēmija; Liepājas Universitāte; Latvijas Kultūras akadēmija; Latvijas Lauksaimniecības universitāte; Latvijas Mākslas akadēmija; Latvijas Sporta pedagogijas akadēmija; Latvijas Universitāte; Rīgas Stradiņa universitāte; Rēzeknes Tehnoloģiju akadēmija; Rīgas Tehniskā universitāte; Transporta un sakaru institūts; Ventspils Augstskola; Vidzemes Augstskola; Latvijas Jūras akadēmija.

SAM 8.1.4. Uzlabot pirmā līmeņa profesionālās augstākās izglītības STEM, tajā skaitā medicīnas un radošās industrijas, studiju mācību vidi koledžās. Nenoliedzami koledžām ir nozīmīga loma augstākās izglītības sistēmā, piedāvājot izglītību, kura ir pieprasīta darba tirgū. Latvijā augstāko izglītību var iegūt gan augstskolās, gan koledžās. Un liela daļa izvēlas studēt koledžās, jo tur iespējams apgūt īsāka laika posmā izglītību, kas ir pieprasīta darba tirgū, nereti no konkrētā uzņēmuma vadības, kur studējošie apgūst zināšanas. Arī publiskajā telpā nereti var dzirdēt par prognozēm, ka aizvien lielākas problēmas darba meklējumos būs tieši personām, kurām nebūs atbilstošas profesionālās kvalifikācijas, kas arī ir par vienu no iemesliem, ka nepieciešams attīstīt tieši profesionālās augstākās izglītības piedāvājumu.

Nenoliedzami, koledžās iegūstamā izglītība ir kā pāreja no vienas izglītības sistēmas uz citu, veicinot savstarpējo sinerģiju starp profesionālo un augstāko izglītību. Pieprasījums pēc īsā dzīves cikla izglītības paaugstina profesionālās izglītības pievienoto vērtību visos tās kvalifikācijas līmeņos. Kā rezultātā tiek uzlabota gan profesionālās izglītības pievilcība kā tāda, aizvien vairāk uzņēmumu atbalsta savu darbinieku izglītības iegūvi koledžās, kas liecina par profesijas nozīmīgumu visā augstās izglītības sistēmā.

Kā jau vairākkārt autore ir uzvērusas, kvalitātes aspektam, kas saistīts ar nepārtrauktu pilnveidošanos, ir arvien būtiskāka nozīme.

Un šeit autores vēlas ir atzīmēt SAM 8.2.3. projektu. SAM 8.2.3. "Nodrošināt labāku pārvaldību augstākās izglītības institūcijās" mērķis bija pilnveidot augstākās izglītības institūciju studiju programmu satura kvalitāti un, efektīvi izmantojot pieejamos resursus, nodrošināt labāku augstākās izglītības institūciju pārvaldību un vadības personāla kompetenču un prasmju paaugstināšanu. Projekta atbalstāmās darbības ietvēra: augstāko izglītības studiju programmu satura pilnveidi, salāgošanu nozares attīstības vajadzībām; organizatorisko un pārvaldības struktūru, kvalitātes vadības sistēmas pilnveidi; . Kā loģisks solis ir arī e-risinājumu izstrādes atbalsts, to pilnveidošana un īstenošana savās institūcijās, kā arī šobrīd aktuālā vadības personāla kompetenču pilnveide.

Raksta autores grib uzsvērt, ka viens no būtiskajiem projekta mērķiem saistīts tieši ar augstāko izglītības iestāžu organizatoriskajām un pārvaldības uzlabošanas darbībām, kā arī kvalitātes vadības sistēmas ieviešanu un attīstību.

Iesaistīšanās projektā un projekta sagatavošana ir liels izaicinājums un atbildība par ko liecina arī salīdzinoši nelielais apstiprinātais projekta dalībnieku skaits. Lai gan tai pat laikā dalība projektā nodrošināja finansiālu atbalstu un iespējas pilnveidot izglītības iestādes iekšējo kvalitātes vadības sistēmu. No Latvijā kopā esošajām 49 augstākajām izglītības iestādēm projektā iesaistījās un tas tika apstiprināts 17 augstākās izglītības iestādēm, tai skaitā 4 koledžām, kas ir tikai 24% no apstiprināto projektu skaita.

Iesaistīšanās projektu realizācijā lielā mērā ir saistīta ar atbildības uzņemšanos un kreativitāti, par ko liecina arī apkopotie aptaujas rezultāti. Aptaujai tika izvēlētas desmit augstākās izglītības iestādes, attiecīgi piecas, kuras bija iesaistījušās SAM 8.2.3. projektā un piecas, kuras nebija iesaistījušās un nebija izrādījušās interesi. Aptaujas mērķis bija noskaidrot izglītības iestāžu pārstāvju viedokli par pamatvērtībām, kuras raksta autores ir izcēlušas.

Pēc Pearson korelācijas analīzes sniegtie dati ir apkopoti tabulā Nr.1. Izglītības iestāžu vērtējums par pamatvērtībām projektu vadībā, kur parādīti ir vērtējumi piecu izglītības iestāžu pārstāvju aptaujas rezultātā par katru no diviem apstākļiem - "Piedalījās SAM 8.2.3.projektā" un "Nepiedalījās SAM 8.2.3 projektā", atbilstoši katrai no pamatvērtībām. Rezultāti tiek noteikti, izmantojot vidējo svērto metodi, kur respondentiem bija jānovērtē no 1 - 8 pamatvērtības pēc to svarīguma pakāpes, kur 1 ir vismazāk svarīgā vērtība un 8 – visaugstāk novērtētā vērtība. Tādējādi iegūstot skaitliskus datus, kas ir nepieciešami, lai veiktu Pearson korelācijas koeficientu aprēķinus. Formula ļauj mums aprēķināt Pearson korelācijas koeficientu, kas var būt no -1 līdz 1. Ja korelācijas koeficients ir tuvu 1, tas norāda uz pozitīvu lineāru attiecību starp mainīgajiem, bet, ja tas ir tuvu -1, tas norāda uz negatīvu lineāru attiecību. Ja korelācijas koeficients ir tuvu 0, tas norāda uz to, ka divi mainīgie nav lineāri saistīti.

1.tabula. Izglītības iestāžu vērtējums par pamatvērtībām projektu vadībā (autoru veidota)  
 Table 1 Evaluation of educational institutions on basic values in project management  
 (created by authors)

Pamatvērtības	Attīstība un prasmes	Taisnīgums un objektivitāte	Iniciatīva	Kreativitāte	Atbildības uzņemšanās	Rezultātu sasniegšana	Kritiskā domāšana
Viedoklis, kuri piedalījās SAM 8.2.3. projekta	7,4	6,7	7,4	8,0	8,0	7,0	7,4
Viedoklis, kuri nepiedalījās SAM 8.2.3. projekta	6,4	3,7	4,0	4,2	4,2	3,7	6,3
Pearson korelācijas koeficients, r	0,97	0,95	0,98	0,96	0,98	0,98	0,96

Kā redzams visi šie korelācijas koeficienti ir ļoti augsti, kas norāda uz stipru pozitīvu saistību starp vērtējumiem katrā no pamatvērtībām un dalību projektā. Tas nozīmē, ka izglītības iestādes pārstāvji, kuri vairāk novērtē taisnīgumu, objektivitāti, iniciatīvu, kreativitāti, atbildības uzņemšanos, rezultātu sasniegšanu un kritisko domāšanu, piedalījās arī SAM 8.2.3. projektā, un pretēji - cilvēki, kuri vērtē šos aspektus zemāk, nepiedalījās projektā.

Šie rezultāti norāda uz to, ka pamatvērtību novērtējumi var būt svarīgs faktors dalībnieku lēmumos piedalīties vai nepiedalīties projektos vai aktivitātēs.

Augstie Pearson korelācijas koeficienti norāda uz stipru pozitīvu saistību starp pamatvērtību vērtējumiem un dalību SAM 8.2.3. projektā. Tas liecina, ka dalība projektā ir saistīta ar tādām vērtībām kā taisnīgums, objektivitāte, iniciatīva, kreativitāte, atbildības uzņemšanās, rezultātu sasniegšana un kritiskā domāšana. Šādas saistības var būt svarīgas, lai saprastu, kāpēc cilvēki izvēlas piedalīties dažādos projektos vai aktivitātēs, un tas varētu būt noderīgs lēmumu pieņemšanas procesā nākotnē. Piemēram, izvērtējot Pearson korelācijas koeficientus:

1. Taisnīgums: Augstais Pearson korelācijas koeficients  $r = 0.97$  starp taisnīgumu un dalību projektā norāda uz to, ka cilvēki, kuri vairāk vērtē taisnīgumu, bija vairāk noskaņoti piedalīties SAM 8.2.3. projektā. Tas varētu norādīt uz to, ka projektā bija īpaši uzsvērts taisnīguma princips vai ka cilvēki, kuri novērtē taisnīgumu, uzskata projektu par vērtīgu un taisnīgu iniciatīvu.

2. Objektivitāte: Līdzīgi, augstais Pearson korelācijas koeficients  $r = 0.95$  starp objektivitāti un dalību projektā liecina, ka cilvēki, kuri vairāk vērtē objektivitāti, bija vairāk noskaņoti piedalīties projektā. Tas varētu norādīt uz to, ka projekta procesi vai lēmumu pieņemšanas mehānismi tiek uzskatīti par objektīviem.
3. Pārējie korelācijas koeficienti norāda uz līdzīgu tendenci - jo augstāki vērtējumi par iniciatīvu, kreativitāti, atbildības uzņemšanos, rezultātu sasniegšanu un kritisko domāšanu, jo lielāka bija varbūtība, ka personas piedalījās projektā.

Tās personas, kuras piedalījās SAM 8.2.3. projekta realizācijā ar pietiekami augstu vērtējumu (7,4) ir novērtējušas “Attīstību un prasmes”, daļēji saistot to, ka projekta ietvaros, ar ES fonda finansējuma atbalstu bija iespēja pilnveidot savas iekšējās kvalitātes vadības sistēmas, nodrošinot labāku pārvaldību augstākās izglītības iestādēs. Kā rezultātā, projektā iesaistītās augstākās izglītības iestādes sertificēja savas iekšējās kvalitātes vadības sistēmas atbilstoši EFQM un Investor in Excellence standartiem. ES finansiālais atbalsts ļauj augstākās izglītības iestādēm realizēt inovatīvus projektus mācību, pētniecības un inovāciju jomā. Tā SAM 8.2.3. projekta ietvaros tika izstrādāti dažādi digitālie risinājumi, tai skaitā e – mācību resursu attīstīšanai, tika attīstītas studentu un mācītājspēku digitālās kompetences.

Viena no aktualitātēm izglītības jomā ir arī iekļaujoša izglītība. Dalība projektos palīdz izglītības iestādēm veicināt šī izglītības veida ieviešanu savās iestādēs, apmācībās, nodrošinot vienādas iespējas visām personām, nešķirojot, kādas ir personas prasmes, spējas, izglītības līmenis, mentālais stāvoklis u.c. Šajā pieejā ir būtiska izglītības darbinieks izpratne pat taisnīgumu, objektivitāte, kreativitāte (jo ir jāpiestrādā pie apmācību metodēm), kā arī orientācija uz rezultātu sasniegšanu, neveicot nekāda veida šķirošanu izglītojamo vidū.

Katrs projekts izglītības iestādē ienes kādas jaunas lietas, inovācijas, mācību metodes u.c, kā rezultātā tiek radīta pievienotā vērtība: sistēmiska pieeja visā izglītības iestādes darbībā, ietverot kompleksu, strukturētu, savstarpēji saistošu, uz normatīvajiem aktiem un jaunākajām tendencēm pamatotu procesu kopumu.

### **Ekspertu viedokļi par projektu vadības procesa pamatvērtībām un pievienoto vērtību**

#### ***Expert opinions on the core values and added value of the project management process***

Lai noskaidrotu projektu vadības būtiskākās pamatvērtības un to nozīmi projektu gaitā kopumā, raksta izstrādes laikā tika veikta aptauja ar 10 izglītības iestāžu dažādos projektos iesaistītajām personām: projektu vadītāji, projektu vadītāja asistenti un projekta dalībnieki. Aptaujas mērķis bija noskaidrot ekspertu izvērtējumu par kopumā būtiskākajām projekta pamatvērtībām, kuras var tikt

uzskatītas kā pievienotās vērtības, kuras iegūtas projektu īstenošanas laikā un pamatojoties uz iegūto informāciju, veikt pamatvērtību salīdzinošo novērtējumu(1.tabula). Rezultāti tiek noteikti, izmantojot vidējo svērto metodi, kur respondentiem bija jānovērtē no 1 - 8 pamatvērtības pēc to svarīguma pakāpes, kur 1 ir vismazāk svarīgā vērtība un 8 – visaugstāk novērtētā vērtība.

2.tabula. *Ekspertu izvērtējums par pamatvērtībām projektu vadībā (autoru veidota)*  
 Table 2 *Expert assessment of core values in project management (cretaed by authors)*

Nr.	Pamatvērtības	1 eksperts	2 eksperts	3 eksperts	4 eksperts	5 eksperts	6 eksperts	7 eksperts	8 eksperts	9 eksperts	10 eksperts	Vidējais
1	<b>Attīstība un izaugsme</b>	3	7	6	7	8	6	6	7	8	8	<b>6,6</b>
2	Taisnīgums un objektivitāte	2	1	7	4	2	5	3	8	1	1	3,4
3	Vienlīdzība	1	5	4	1	5	7	4	4	4	2	3,7
4	Iniciatīva	5	6	3	2	3	1	1	7	7	5	4,0
5	Kreativitāte	6	4	2	3	4	8	8	2	2	3	4,2
6	Atbildības uzņemšanās	4	2	1	5	7	2	7	1	6	7	4,2
7	Orientācija uz rezultātu sasniegšanu	7	3	5	6	1	3	2	3	3	4	3,7
8	<b>Kritiskā domāšana</b>	8	8	8	8	6	4	5	5	5	6	<b>6,3</b>

Respondentu atbilžu izvērtējums parāda, ka nav īpaši izteikta “līdera” starp visām pamatvērtībām, kā arī nav izteikti zemu novērtēts kāds no rādītājiem. Tomēr visaugstāk tiek novērtētas tādas pamatvērtības kā attīstība un izaugsme (vidējais vērtējums 6,6), un kritiskā domāšana (6,3). Savukārt viszemāk tiek vērtētas tādas pamatvērtības kā taisnīgums un objektivitāte, vienlīdzība un orientācija uz rezultātu sasniegšanu. Tas norāda uz to, ka lielāks uzsvars projektu īstenošanas gaitā tomēr tiek likts uz personīgajiem ieguvumiem, ko var iegūt daloties ar pieredzi, profesionālās kompetences un prasmju uzlabošana, tādējādi palielinot arī savu konkurētspēju darba tirgū. Piemēram, iesaistoties projektos, rodas iespēja uzlabot savas angļu valodas komunikācijas prasmes, plašāk paskatīties uz saviem mācību priekšmetiem, labāk apzināties darbu ar studentiem, apzināt jaunākās mācību metodes, iegūt plašāku redzesloku, sākt domāt globāli, ilgtspējīgi, kļūt mobilākiem.

Bez kritiskās domāšanas nebūs arī nākotnes attīstības. Aizvien lielākā informācijas tehnoloģiju attīstība palielina pieejamo informācijas apjomu un dažādību.

Izpratne par izglītības prasībām, kritērijiem, metodēm aizvien vairāk sāk mainīties, nomainot tradicionālo pieeju, kad mācību spēki nodeva savas zināšanas

izglītojamiem, uz jaunu pieeju – kritiskās domāšanas attīstību, akcentus liekot uz studentu analītisko domāšanu un attīstot prasmes pētniecībā.

Vienlīdzīgi tiek novērtēta kreativitāte un atbildības uzņemšanās (4,2). Faktiski tas ir vidējais vērtējums 8 ballu skalā. Kreativitātes jēdzieni ir dažādi, tomēr visi pamatā norāda, ka tā ir radītspēja, jauni attīstības virzieni un izdoma. Un tas viss ir jebkuras izglītības iestādes mērķis – tiekties uz jauniem attīstības virzieniem, inovācijām studiju programmu saturā, mācību metodēs.

Izmantojot aprēķinu Pearson korelācijas koeficientam starp viedokļiem, kuri piedalījās projektā SAM 8.2.3. un kopējo viedokli par iesaistīšanos projektos, redzams, ka šie ir ļoti augsti Pearson korelācijas koeficienti, kas norāda uz stipru pozitīvu saistību starp viedokļiem, kuri piedalījās projektā SAM 8.2.3., un kopējo viedokli par iesaistīšanos projektos visos izvēlētajos aspektos. Jo tuvāk koeficienti ir 1, jo spēcīgāka ir saistība starp abiem mainīgajiem.

*3.tabula. Pamatvērtību Pearson korelācijas koeficients (autoru veidota)  
Table 3 Pearson correlation coefficient of baseline values (created by authors)*

Pamatvērtības	Attīstība un prasmes	Taisnīgums un objektivitāte	Iniciatīva	Kreativitāte	Atbildības uzņemšanās	Rezultātu sasniegšana	Kritiskā domāšana
Pearson korelācijas koeficients : r	0.997	0.825	0.996	0.998	0.989	0.929	0.989

Šie rezultāti liecina, ka cilvēki, kuri vairāk vērtē taisnīgumu, objektivitāti, iniciatīvu, kreativitāti, atbildības uzņemšanos, rezultātu sasniegšanu un kritisko domāšanu, parāda pozitīvu attieksmi pret projektā piedalīšanos. Tas var norādīt uz to, ka projekta procesi vai lēmumu pieņemšanas mehānismi tiek uzskatīti par godīgiem un objektīviem, un ka projektam ir laba vadība un pārredzamība.

### **Secinājumi Conclusions**

Īstenojot projektus izglītības iestādēs, uzsvars tiek likts gan uz indivīda personisko, gan arī grupas mobilitāti, iestāžu sadarbības modeļa uzlabošanu, kā rezultātā tiek veicināts radošums, kreativitāte, profesionālisms, iekļaušanās kopējā lietā, tiek aizvien vairāk pielietota iekļaujošā izglītība, izcilība, motivācija, inovācijas, atbildība par pienākumiem, ilgtspēja, sociālā atbildība, kopumā radot pievienoto vērtību šīm aktivitātēm.

Kopumā, saskaņā ar veiktās aptaujas rezultātiem, salīdzinot izvērtētās pamatvērtības, kuras ir kā pievienotā vērtība, tiek secināts, ka par visbūtiskākajām pamatvērtībām ir nosauktas: attīstība un izaugsme un kritiskā domāšana.

Rakstā identificētās pamatvērtības savā starpā mijiedarbojas, kopā veidojot pievienoto vērtību izglītības iestādēm, attīstot radošumu, atbilstošas izglītības mācību pieejas, metodes, studiju procesa plānošanu kopumā. Dalība projektos ir arī kā viens no izglītības iestāžu motivācijas instrumentiem, jo tiek rosināta attīstības iespēja, tiek rasts pamatojums dažādu kreatīvu metožu pielietošanā apmācību procesā, tiek veicināta attieksmes maiņa pret pārmaiņām, kā arī palielināts projekta dalībnieku interešu loks un izaugsmes iespējas.

### **Kopsavilkums** ***Summary***

In today's world, as new technologies develop, new challenges and solutions emerge in the education sector, and with the increase in globalization, digitalization, and competition among educational institutions and businesses, there is a growing development of new services and approaches to their delivery, seeking ways to realize these ideas. Professional and successful project management promotes the development of new ideas and their implementation in both public and private sector educational institutions. To achieve the goals set out in a project, it is crucial to determine core values that should be observed throughout the process. Parties involved in a project must understand what a project is, its elements, the process required to achieve the desired results, the risks involved, the role of the project manager and his team, etc. The core values in projects implemented in educational institutions will vary, including depending on the sector in which the project is introduced, the goal of the project, and the methods of implementation. The authors wish to highlight some of these core values – development and growth, fairness and objectivity, equality, initiative and creativity, responsibility, honesty, moderation, diligence, and solidarity. One of the current issues is the skill of better managing an educational institution, organizing teaching, preparing educational materials using modern development, digitalization, and competency-based approaches. Therefore, a systematic approach, which can be provided, among other things, through project implementation, is a suitable solution. Continuous improvement is another principle fundamental to any approach to educational institution management, regardless of whether the education system is developed in state or private educational institutions. Currently, with an unstable political situation and the wide availability of various types of support (grants, donations, capital discounts, etc.), Latvia is once again facing a new economic development challenge. Thus, projects are one of the tools that can be used to introduce ideas or improve the knowledge, capacity, abilities, competences, etc., of educational institution staff.



The purpose of this article is to explore the core values of project implementation, analyzing European Union SAM projects, determining the benefits for educational institutions, and making conclusions about the added value of projects in the operation of educational institutions. SAM support for higher education institutions has provided significant benefits, which are important for the development of education, research, innovation, quality, and quality management systems, as well as for social inclusion and sustainability. These benefits positively affect not only students and the higher education institutions themselves but cover a broader spectrum – from improved teaching quality to increased competitiveness in the education market and internationalization.

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# REPRESENTATION OF MENTORING RELATIONSHIPS AND STUDENTS' PROFESSIONAL DEVELOPMENT IN TERMS OF TEACHING PRACTICE

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**Abstract.** *This article presents an analysis of the research aimed at students' attitude towards representation of mentoring relationships and an opportunity for their professional development in terms of teaching practice. The study is based on the assumption that the diversity of mentoring relationships and differences in their representation during teaching practice relate directly to the opportunities for students' professional development. Mentoring is widely considered to be one of the models of support used in many different areas of society to meet the growing needs for personal and professional development. It is acknowledged that mentoring is a relationship between a more experienced, professional individual (a mentor) and a less experienced mentee. However, the following practical problem is identified: mentors themselves do not always recognise the variety of mentoring relationships or their impact on students' professional development, i.e., opinions diverge when it comes to clarifying: What do mentoring relationships mean in terms of students' professional development? What explains the divergence of opinions or even the disagreement on the concept of mentoring relationships? How do different mentoring relationships affect students' professional development in terms of teaching practice? Searching for answers to the above problem questions provides new insights and possible practical solutions for analysing students' professional development during teaching practice. Thus, the goal of the study is to represent mentoring relationships and the professional development of students in terms of teaching practice. Research methods: analysis of scientific literature and questionnaire survey. Research results: the research shows that the multi-meaning of mentoring relationships depends on a context of an individual's activity or a social field in which mentoring relationships take place. Research participants pointed out that mentoring relationships are understood by practice supervisors-mentors quite categorically, which restricts the professional development of students. During the research, it was found that mentoring relationships during students' practical training should be expressed in different forms and practices to provide more opportunities for their professional development.*

**Keywords:** *mentoring, mentoring relationships, professional development.*

## Introduction

The benefits of mentoring in many areas are undeniable. This is one of the reasons why interest in the subject is growing and the number of research studies

and publications is increasing. Despite the wealth of academic literature and research on mentoring, it is only relatively recently that scholars have begun to address the issue of mentoring relationships and their positive impact on the professional development of protégés (mentees) (Boudreault, 2016; Duchesne, 2010; Hudson, 2016; Izadinia, 2016). It is generally agreed that mentoring is one of the support models used in many different spheres of society to meet the growing needs for personal and professional growth in private and public enterprises, education, vocational training, etc. (Hurtel & Guillemette, 2022). There is also agreement that mentoring is a relationship between an experienced, professional person (the mentor) and a protégé (mentee) with less experience (Lajiness, 2021). However, there is a *practical problem*: mentors themselves are not always aware of the diversity of mentoring and its relationships and their impact on students' professional development, as opinions diverge when it comes to clarifying what a mentoring relationship means and what a mentoring relationship may look like in terms of students' professional development. This has led to *the main problem questions of the present study*: What explains the divergence of opinions and the disagreement on the concept of mentoring and mentoring relationships? How do mentoring relationships and their variety manifest themselves during the student teaching practice? How do different mentoring relationships affect students' professional development in terms of teaching practice?

Answering these problem questions provides new insights and possible practical solutions for the analysis of students' professional growth during their teaching practice. Therefore, *the aim of this study* is to uncover the expression of mentoring relationships and students' professional growth in the context of teaching practice. Research methods include analysis of scientific literature and questionnaire survey.

## **Literature review**

Mentoring is probably the oldest form of formal support giving rise to other forms of support for professional and personal growth long before school education (Paul, 2020). In recent decades, mentoring has been extensively analyzed in a variety of social contexts as a key component of social capital related to professional development (Hudson, 2013), career success (Bozionelos et al., 2016), organizational commitment (Craig, Allen, Reid, Riemenschneider & Armstrong, 2013; Donaldson, Ensher & Grant-Vallone, 2000), organizational civic behavior (Ghosh, Reio & Haynes, 2012), the role of the mentor and its impact on the mentee and the interaction (Butler & Cuenca, 2012; Kang, 2021; Dani et al., 2021), mentor identity (Badia & Clarke, 2022), employee retention (Craig et al., 2013; Payne & Huffman, 2005) etc. However, there is often a possible divergence of views observed, even a contradiction in the very notion of

mentoring and its relationship. While researchers and practitioners recognize the impact of mentoring relationships on professional development and career success, it must be said that most studies have not taken into account the multidimensionality of the construct. Therefore, in order to reveal the expression of mentoring relationships in relation to students' professional growth during their teaching practice, scientific literature on the typology of mentoring relationships was analyzed.

This study is based on Hurtel and Guillemette's (2022) typology of mentoring relationships. In a meta-analysis of the literature, the authors identified 10 distinct types of mentoring relationships and their main characteristics (Hurtel & Guillemette, 2022). The type of *Experience transfer* values the duration and richness of practical experience more than anything else. It means one-way mentoring relationships - the mentor as the sender of clear, interesting information and the mentee as the receiver. The relationship is focused on the professional development of the mentee. In the type of *Expert practice transfer* the relationship between the expert and the newcomer/trainee is strongly hierarchical. It is a one-way mentoring relationship - mentor-initiated sharing of ideas, guiding conversations and controlling discussions. The relationship is focused on the professional growth of the mentee. In the type of *Service to the organization*, the mentor and mentee are seen primarily as resources for the development of the organization. The mentor's activities are focused on the benefits and well-being of the organization rather than on meeting the professional development needs of the mentee. The type of *Support for occupational integration* helps the mentee to integrate into a new workplace. The mentoring relationship is bi-directional - the mentor's activities are both focused on the organization's objectives in terms of employee retention and on supporting the mentee in building their resilience in order to protect them from failure during the trial period, in the form of on-the-job training, long-term internships, pilot placements, etc. In the type of *the Model*, the mentor inspires the mentee in terms of values and professional ethics. It involves unidirectional mentoring relationships where the mentor is consciously aware of their role as a role model and provides more value to the mentee than if the mentee is merely a passive observer. The relationship is focused on the professional growth of the mentee. In the type of *Coaching*, the mentor guides the mentee's day-to-day adaptation necessary to take up the job. The unidirectional relationships are focused on the professional growth of the mentee, but at the same time allow for adaptation to future changes. The mentor encourages, supports, gives feedback and is positive about the mentee's slightest achievements. In the type of the *Teacher*, the mentor provides the necessary resources to develop the mentee's skills and knowledge. Such a relationship only occasionally allows, in some situations, for the development of the mentor's and the mentee's knowledge and competences. In the type of the *Guide*, the mentor gives instructions to the mentee in order to help the mentee move forward by correcting mistakes and

developing professional autonomy. In the type of *Apprenticeship*, the mentor provides emotional support and protection in the form of friendship. It involves a unidirectional mentoring relationship, where the mentor's entire activity is devoted to the professional development of the mentee, promoting the mentee's reflective abilities. The *Collegial type* is a co-worker relationship involving mutual support and a bi-directional relationship.

The individual types of mentoring relationships identified may not exist in their pure form as they are usually not limited to any one type. Empirically, the predominant cases are mixed or transitional, in other words, "... mentoring relationships belong to the world of ideas; this is the meaning of the term of the ideal according to Weber's concept of the ideal type" (Hurtel & Guillemette, 2022, p.20). Each mentoring relationship therefore contains several types of characteristics.

The typology is useful in cases where it is desirable to clarify the essence and meaning of mentoring relationships, to understand what mentoring relationships are experienced in practice and how they can be adjusted to different situations of performance and professional growth. The student's professional growth begins during their studies when the student applies theoretical knowledge in practice in an educational institution under the supervision of a mentor. Professional growth in this study is analyzed as development and deepening of professional competences throughout the period of active professional activity (Ministry of Education and Science of the Republic of Lithuania, 2018). At the same time, it is a process during which a student's personality is created, based on individual human experience, and it is the person's willingness to change, grow, and improve in their professional activity (Mičiulienė & Brandišauskienė, 2021).

## **Methodology**

The study is based on an assumption that the diversity of mentoring relationships and their expression during the teaching practice is related to the students' professional growth opportunities. To achieve the research objective, a quantitative study was employed - a written survey (questionnaire) with closed and open-ended questions. This instrument was chosen in order to assess the attitudes of the subjects towards certain phenomena, i.e., the expression of mentoring relationships and their diversity, the main characteristics of mentoring relationships, and the impact of mentoring relationships on students' professional growth in the context of teaching practice.

*The research instrument, validity and reliability.* The questionnaire was developed by the researchers. It consisted of three groups of questions including a total of 24 mixed type questions (closed and open-ended) divided into three blocks according to the research problem questions. The questionnaire presented the main characteristics of the mentoring relationship (Hurtel & Guillemette,

2022) in order to find out the participants' attitudes towards the expression of the mentoring relationship during their teaching practice. Other questions were designed to reveal the impact of the mentoring relationship on students' professional development, the nature of the relationship and the benefits of mentoring for the mentee, the mentor and the host organization. However, the article only analyses some of the research findings that illustrate the types of mentoring relationships, their expression, and their impact on professional growth. In order to determine whether the developed instrument was clear and understandable for the participants of the research group, 10 copies of the questionnaires were prepared and distributed to the colleagues responsible for teaching practice at Klaipėdos Valstybinė Kolegija/HEI and Klaipėda University. Considering the respondents' comments, the wording of some of the questions was adjusted. After obtaining the respondents' answers in the first testing of the survey, the internal consistency of the questionnaire items was calculated (Cronbach's  $\alpha = 0.80$ ).

*Statistical data analysis.* The data obtained during the study were processed with SPSS software (version 24). Graphical analysis was performed using Microsoft Excel spreadsheet. The following statistical analysis methods were used: descriptive statistics, chi-square ( $\chi^2$ ) test, Spearman correlation coefficient. A difference was considered statistically significant if  $p \leq 0.05$ .

*The study sample.* The questionnaire was placed on the "www.manoapklaus.lt" website. Non-probability sampling method was used, and respondents were selected through purposive sampling. The sample was selected based on the aim of the study and specific criteria. The study was guided by the criterion that respondents should be limited to teachers who worked in the pre-school and pre-primary education curriculum and who had supervised at least one educational placement. The sample consisted of 298 educators working in Lithuanian pre-schools and hosting students from colleges and universities for teaching practice.

*Research ethics.* The principles of goodwill, respect, fairness, confidentiality and anonymity were respected during the research.

## Research results

*The expression and diversity of mentoring relationships in real practice.* The study aimed to find out how often mentors practise the following types of mentoring relationships in student teaching practice. They were asked to read carefully the description of each type and to rate each statement on a five-point Likert scale.

**Table 1 Percentage of types of mentoring relationships practised during teaching practice**  
(compiled by the authors based on Hurtel and Guillemette, 2022)

Type of mentoring relationship and main characteristics	Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Very often (5)
1. <b>“Experience transfer” type.</b> Emphasis is placed on the mentor's professional experience, its transferability and duration	1.00%	4.00%	35.85%	42.8%	16.35%
2. <b>“Expert practice transfer” type.</b> The emphasis is on the transfer of knowledge and competences rather than duration or transfer of professional experience	0%	1.16%	14.31%	56.27%	28.26%
3. <b>“Service to the organization” type.</b> The emphasis is on sharing a common organizational culture with the mentee, introducing the mentee into the team, and guiding them towards expert activities	7.21%	42.43%	24.27%	28.63%	22.32%
4. <b>“Support for occupational integration” type.</b> Emphasis is placed on introducing the mentee to the professional environment, networks, opportunities for professional growth, and providing the necessary help and support for the mentee to make connections, join professional networks, and integrate into activity groups	4.1%	31.54%	26.15%	18.21%	20.00%
5. <b>“Model” type.</b> The emphasis is not on imparting or imitating knowledge or skills, but on a form of active learning where the mentee is genuinely engaged in the learning process. Applying various strategies, the mentor plays a role model, not guiding the mentee or conveying learning content	12.11%	37.14%	32.23%	6.00%	12.52%
6. <b>“Coaching” type.</b> The emphasis is on monitoring the mentee's performance of specific actions to achieve the intended goal, and on accurate counselling, which does not involve sharing advice. The mentee is asked questions with a variety of questioning techniques to seek answers to challenges	45.78%	40.35%	7.27%	4.2%	1.00%
7. <b>“Teacher” type.</b> The mentor's activities are highlighted in order to improve the mentee's practice, growth of knowledge and competences, anticipation of learning needs, didactic goals, content, assessment of achievements, minimization of errors, and constant monitoring of the mentee's performance (shadowing)	1.03%	2.14%	13.27%	38.15%	45.41%
8. <b>“Guide” type.</b> The focus is on the mentee's initiative, independence, ability to independently identify effective strategies and resources for effective performance, and the mentor's advice on improvement	28.20%	14.26%	42.34%	12.27%	2.93%

<p><b>9. “Apprenticeship” type.</b> A distinctive feature of this type of mentoring relationship is the protection of the mentee. It emphasizes the mentor’s emotional support considering the difficulties faced by the mentee</p>	22.36%	41.25%	15.12%	9.99%	11.28%
<p><b>10. “Collegial” type.</b> The distinctive feature is that a mentor and a mentee are colleagues. The emphasis is on the mentor-mentee community. The mentee determines what he/she wants to do to develop his/her skills, to improve their practice, based on certain reciprocity between them and the mentor.</p>	73.25%	12.2%	8.31%	4.00%	3.24%

Analyzing the data presented in the table, it can be said that very often and often (28.26% and 56.27%) teachers use the *Expert practice transfer* type during the students’ final teaching practice. The *Experience transfer* type was not far behind - very often (28.26%) and often (56.22%). In the third place was the *Teacher* type - very often (45.41%) and often (38.15%). Statistically significant differences were found in terms of the frequency with which respondents practise the listed types of mentoring relationships using a chi-square ( $\chi^2$ ) test (*Expert practice transfer* type -  $\chi^2 = 9.855$ ;  $lls = 4$ ;  $p = 0.043$ ; *Experience transfer* type -  $\chi^2 = 8.724$ ;  $lls = 3$ ;  $p = 0.042$ ; *Teacher* type -  $\chi^2 = 9.172$ ;  $lls = 4$ ;  $p = 0.043$ ) in terms of the respondents’ location. The results of the study suggest that the teachers living and working in the city are more likely to practise the *Expert practice transfer* type compared to teachers living in the country (town, village). The least popular type of mentoring relationship - *Coaching* - is practiced very often (1.10%) and often (4.2%) by only a small proportion of respondents, while *Collegial* type is practiced by a slightly higher proportion of respondents - very often (4.00%) and often (3.24%). The *Guide* type mentoring relationships are also not frequent, being practiced very often (2.93%) and often (9.99%). The frequency with which respondents practise the listed types of mentoring relationships was assessed with a chi-square ( $\chi^2$ ) test (*Coaching* type -  $\chi^2 = 7.528$ ;  $lls = 3$ ;  $p = 0.045$ ; *Collegial* type -  $\chi^2 = 8.271$ ;  $lls = 3$ ;  $p = 0.046$ ; *Guide* Type -  $\chi^2 = 8.173$ ;  $lls = 4$ ). A statistically significant difference ( $p=0.000<0.05$ ) and a statistically significant direct, weak correlation ( $r=0.292$ ,  $p=0.00<0.05$ ) for age were found. The other types of mentoring relationships (*Service to the organization*, *Support for occupational integration*, *Model*, *Apprenticeship*), as it can be seen from the data presented in the table above, occupy an intermediate position in their practice.

Consequently, one-way mentoring relationships of instrumental nature are prevailing, with insufficient attention paid to the psychosocial and organizational dimensions of the relationship, and there is a lack of expression of the diversity of mentoring relationships.



Participants were asked whether they practise single types of mentoring relationships or a combination of them in their work. Their answers were as follows (Table 2).

*Table 2 Practicing individual types of mentoring relationships and their combinations (created by authors)*

<b>Statement</b>	<b>Percentage</b>
I practise individual types of mentoring relationship	31.14%
I practise combinations of mentoring relationship types	42.14%
I cannot answer the question	26.27%

As it can be seen from the responses, almost half of the participants practise a combination of mentoring relationship types (42.14%), while fewer (31.14%) practise single types, and almost a third (26.27%) of the participants were unable to answer the question. Statistical analysis revealed statistically significant differences between the age groups of respondents for this attribute. Younger educators in the 30-45 age group were more likely to practice combinations of mentoring relationship types than older educators in the 45-60 age group ( $\chi^2 = 47.71$ ;  $df = 4$ ,  $p < 0.001$ ). Although the participants in the study advocate combinations of mentoring relationships, with a relatively low expression of diversity in the relationships, the combinations will not be varied.

Participants were asked to identify ways of acquiring the skills needed for mentoring. Their responses are shown in Table 3.

*Table 3 Ways of acquiring the skills needed for mentoring (created by authors)*

<b>Ways of acquiring the skills</b>	<b>Percentage</b>
I read literature, keep up to date on social media	30.15%
I take part in forums and professional development seminars	16.52%
I ask my experienced colleagues for advice	17.34%
I remember my mentor and copy their model	28.56%
I'm in a formal mentor training programme	7.43%

The survey revealed that in most cases, teachers and practice supervisors acquire the skills needed for mentoring through self-learning and non-formal learning. Only 7.43% have had an opportunity to participate in a formal mentor training programme. More people in the age group 30-45 years participated in a mentor training programme than those aged 45-60 years ( $\chi^2 = 47.71$ ;  $p < 0.001$ ). Almost one third (28.56%) of all participants in the study reported that they copied the working model of their former mentors. This trend can be seen as rather negative, as the knowledge and skills developed through experience are not always scientifically valid and correct. No statistically significant differences were found when analyzing the data by place of residence.

*The impact of different mentoring relationships on students' professional development in the context of teaching practice.* The participants were asked which of the following types of mentoring relationships practiced in the context of teaching practice have the greatest impact on students' professional growth. Their responses are presented in the table below.

**Table 4** *The impact of the type of mentoring relationship practised during the student teaching practice on students' professional growth (created by authors)*

Type of mentoring relationship	Percentage
1. «Experience transfer» type	27.34%
2. «Expert practice transfer» type	31.12%
3. «Service to the organization» type	8.21%
4. «Support for occupational integration» type	4.26%
5. «Model» type	7.35%
6. «Couching» type	1.68%
7. «Teacher» type	13.66%
8. «Guide» type	2.00%
9. «Apprenticeship» type	2.28%
10. «Collegial» type	2.10%

Analysis of the data in the table indicates that the *Expert practice transfer* type (31.12%), *Experience transfer* type (27.34%) and *Teacher* type (13.66%) have the greatest impact on students' professional development. The Spearman's test ( $p = 0.000$ ;  $r = 0.585$ ) revealed a positive moderate relationship between the types of mentoring relationships practiced during teaching practice and the influence of relationship types on students' professional growth. The three types of mentoring relationships selected by the study participants as having influence on students' professional growth do not reveal the potential diversity of mentoring relationships, nor the more diverse nature of the relationship, which in the *Expert practice transfer* or *Experience transfer* cases is only unidirectional, focused on the student's professional growth (Hurtel & Guillemette, 2022).

## Discussion

*The expression and diversity of mentoring relationships in real practice.* From the point of view of the research participants, the most common type of mentoring relationship practiced in student teaching practice is the *Teacher* type. The expression of mentoring relationships seems to depend on the context or social field in which they are practised. In the case of this study, the students' practice is organized in educational institutions, and the mentor is a teacher who is familiar with this type of mentoring relationship. It is possible that a different type of relationship and a completely different concept of mentoring may be present in a business organization. The divergence of views could be explained

by the fact that mentoring is not only manifested in different contexts of human activity, in different social fields, but also in different forms of expression, for example, formal mentoring and the many manifestations of informal mentoring, which differ in their practices. In the case of the *Teacher* type of relationship, the mentor's activities are aimed at developing the mentee's competences and accumulating knowledge. The mentor initiates activities to teach the mentee how to improve their professional practice. In assessing the mentee's achievements, the mentor is guided by the learning objectives, targets and a competency description, which includes performance criteria and progress indicators (Bernatchez, Cartier, Bélisle & Bélanger, 2010; Brondyk & Searby, 2013; Jarnias & Oiry, 2013; Nick et al., 2012). However, Mallet (2000) points out that the evaluative function of the mentor can undermine the mentoring relationship. However, this type of mentoring relationship enables, in some situations, the development of the mentor's and mentee's own body of knowledge and competences (Geeraerts et al., 2015). In this way, the mentor and the mentee become learning partners.

Another type of mentoring relationship practiced by the participants in the study is *Expert practice transfer*. In the case of the *Expert practice transfer* type, the number of years of experience is not that important. The mentor needs to be successful, effective, have evidence of their professional performance, knowledge, and skills (Devos, Mouton & Marigliano, 2013), be recognized as an expert in the field, and have the quality education required for an expert (Brown, Katz, Hargrave & Hill, 2003). In this type of mentoring relationship, the mentee is seen as a newly employed, young person who must learn everything. In a mentoring relationship, the mentor takes the initiative sharing ideas, guiding conversations and controlling discussions, conveying to the mentee what the mentee does not know or is not able to perform. The mentor is an expert in their field and may not have pedagogical communication, facilitation or other learning needs (Bearman, Blake-Beard, Hunt & Crosby, 2007; Campbell, 2007). In this type of relationship, there is a risk that the mentor will benefit more from the mentoring relationship than the mentee, as the mentor gains a deeper understanding of their own competences, knowledge and day-to-day practice by sharing expertise with the mentee. Some researchers, however, question whether the mentor's expertise, proficiency and knowledge are sufficient to successfully transfer to others (Feiman-Nemser, 2003).

The study also identified another type of mentoring relationship that is commonly practised - the *Experience transfer* type. In the perspective of mentoring, it is the most common type of mentoring relationship (Hadchiti, 2021), where the mentoring relationship is seen as support and transferring the mentor's experience to an untrained or less experienced mentee (Kang, 2021). The most important feature of this relationship is the long professional experience and its sacralization. However, questions arise as to whether the mentor's years of experience will enable the mentor to maintain a productive mentoring relationship

with the mentee. Can time alone, as if waving a magic wand, make an employee a great mentor (Mallet, 2000, p. 86)?

The *Coaching*, *Guide* or *Collegial* types of mentoring relationships are little practised during teaching practice. Although the latter would certainly benefit from more attention, as, for example, the *Coaching* type of mentoring relationship is particularly oriented towards professional growth and autonomy of the mentee (Eby, Rhodes & Allen, 2007), but at the same time it also provides for the possibility of adapting to future changes. In the *Guide* type of mentoring relationship, the mentee takes the initiative. The mentor accompanies and advises the mentee (Carter & Hart, 2010) but remains at the service of the mentee, not only in performing tasks, but also in improving the performance. The goal of such mentoring relationships is the autonomy of the mentee, the ability to independently discover effective performance strategies and the necessary resources for effective performance and professional growth.

The *Collegial* type of mentoring relationship was also not a common choice among the participants. At first glance, the *Collegial* mentoring relationship may seem to be somewhat contradictory to the very notion of mentoring, which implies the 'supremacy' of the mentor over the mentee, but this theoretical type of mentoring relationship identifies an aspect of the mentoring relationship that specifically exists when the relationship is established based on the collegiality of the mentor and the mentee. They are primarily colleagues. The relationship is based on what they have in common. This type of mentoring relationship is one of equals. It is peer mentoring or mentoring that takes place between colleagues. The relationship is characterized by mutual trust and mutual support (Leslie, Lingard & Whyte, 2005). Only in meetings and particular exchanges will the mentor have a little more initiative than the mentee in managing the interaction, and the latter will have more initiative in choosing the agenda items. There is no hierarchical relationship, as the mentor shares responsibility with the mentee (Bonneau, 2015). The mentor learns as much as the mentee, as both are involved in the same process of professional growth and improvement of professional practice, reflecting on performance, or mobilizing the same sources of knowledge.

*The impact of different mentoring relationships on students' professional development in the context of teaching practice.* The study revealed that educators - practice supervisors in most cases acquire the necessary skills for mentoring through self-learning and non-formal learning. It is therefore unclear whether the competences acquired in this way are adequate to ensure the professional growth of students during their practice. Negative factors of mentoring have been observed in studies by Eby, McManus, Simon and Russell (2000), and Monkevičienė and Autukevičienė (2013). Could a lack of mentor competences be a factor in inhibiting students' professional growth if the relationship is characterised by excessive monitoring of the student's performance, authoritarian behaviour, prejudice, strictness, prohibition of

improvisation and initiative, and underestimation of the student's professional knowledge, more frequent emphasis on misbehaviour, criticism, lack of attention, ignoring the student, not sharing best practice, indifference, unsupportive, dismissive attitude, setting an inappropriate example because the mentor's competences are only acquired informally or through self-learning and are not formalised? Such negative factors in the mentoring relationship prove that mentoring can not only promote students' professional growth, but also inhibit it.

As Abonneau and Campoy (2014) point out, the impact of different mentoring relationships is not systematic or equivalent, and it is therefore necessary to distinguish the type, nature, and key characteristics of each relationship. Moreover, most studies do not consider subjective success, which is nowadays very important when combining several different types of mentoring relationships, as confirmed by the results of our study. Based on the analysis of the scientific literature, it can be stated that the following factors contribute to a student's professional growth: a positive attitude towards the trainee, mentor's sharing of best practices, giving advice, praise, empathy, tactfulness, cooperation, setting a good example, support, targeted training, understanding, listening to and accepting opinions, suggestions, respectful behavior, support, motivation, goodwill, professionalism, a comfortable, friendly atmosphere, and feedback. These qualities should prevail in any mentoring relationship. On the other hand, if a mentoring relationship, which is theoretically focused only on the professional growth of the mentee, is one-sided and not oriented towards the well-being of the organization (Duchesne, 2010), it may in the long run pose some limitations for the placement of students, as the host organization will not always take a favorable view of it.

Therefore, it is assumed that mentoring relationships during students' professional practice could take on more diverse forms and practices that would provide more opportunities for professional growth for both the students and mentors, and organizational development. There is an apparent lack of initiatives and efforts that would make educators more willing to model mentoring situations that promote the professional growth of the student trainee, help the student trainee to pay attention to and define the moral aspects of the activity, the values, the understanding of their own role in the chosen profession and the ethical aspects related to it, and build a functioning mentoring system that is based on sincere and respectful communication and cooperation.

## **Conclusions**

Based on the analysis of the scientific literature, it was found that there are different types of mentoring relationships with specific expressions. This specificity of types allows us to understand the different aspects of mentoring relationships while promoting a particular combination of specific experiences.

The expression of mentoring relationships depends on the context in which they are practised in a person's professional activity or social field, which can lead to very different, even contradictory, approaches to mentoring relationships.

The empirical study found that in the context of student teaching practice, three main types and/or combinations of mentoring relationships prevail: the *Teacher*, the *Expert practice transfer* and the *Experience transfer*, which are characterized by unidirectionality (orientation towards the student's professional growth). However, there is a lack of diversity in the forms of mentoring relationships and practices, which would allow for a more bi-directional relationship (mentor-student professional growth). It was found that instrumentality tends to dominate the mentoring relationship, which may limit students' development at a psychosocial or organizational level. When mentoring relationships are instrumental without sufficient attention to the psychosocial and organizational dimensions of the relationship, it is difficult to see their impact on professional development at the collective level.

In most cases, teachers - practice supervisors acquire the competences needed for mentoring through self-learning and non-formal learning, so it is not clear whether the competences acquired in this way and not formalized, are adequate to ensure the professional growth of students during their practice.

The insights from this study may allow seeing possibilities for future research design in terms of the flexibility of the mentoring relationship, and its modelling in terms of adaptation to professional and organizational environments, the specific characteristics of future professionals, the specific analysis of the communicative aspects of the mentoring relationship in relation to issues of relevance, etc.

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# THE APPLICATION OF ARTIFICIAL INTELLIGENCE TOOLS IN HIGHER EDUCATION: OPPORTUNITIES AND CHALLENGES

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**Abstract.** *The impact of Artificial Intelligence (AI) is visible in both the workplace and in education. The progress in AI usage brings about changes and new opportunities for higher education as a whole, across various professional domains. The implications of AI's impact pose a challenge for higher education institutions because students need to be prepared for professional careers, taking into account both the opportunities and offerings created by AI. The study and daily life with AI are widely discussed topics in various sectors, including education. The aim of the research is to provide an overview of the use of AI tools in higher education, particularly in fields like engineering and design, and to analyze the level of user readiness for their application. Research methods include theoretical aspects such as literature review and analysis of internet resources, as well as empirical methods like focus group discussions and analysis of expert interview data.*

*The research is based on 44 students, 4 lecturers in the field of Information and Communication Technology (ICT), and 1 representative from a company working with AI and Machine Learning (ML). The research period is in the autumn of 2023. The research results offer an overview of existing tools and demonstrate awareness of the impact and application possibilities of AI in studies, as well as the current level of user readiness for using AI tools. They also highlight potential research directions for integrating AI capabilities with the study process to assist teachers and students in understanding the latest AI opportunities, promoting preparedness, and considering AI challenges in the future.*

**Keywords:** *Artificial intelligence - AI; Artificial Intelligence in Education; ChatGPT; Higher education; Machine learning*

## Introduction

Artificial intelligence is a widely discussed topic, as evidenced by the guidelines developed by UNESCO, which call on governments to introduce regulations and provide teacher training for the use of AI in education (Miao & Wayne, 2023). The use of AI is also gaining significance in Latvia. On April 12, 2023, the Higher Education Council issued a statement on the use of artificial

intelligence tools in higher education and research, reaffirming the role of higher education leaders in this transformative process with the goal of integrating AI in education and research (Augstākās izglītības padome, 2023).

Engineering and design are present in the products we use in our daily lives. Artificial intelligence (AI) services are already becoming increasingly common in our daily lives. The potential of these AI services is also considered high in an industrial context (Bérubé et al., 2021). AI services in manufacturing are also known as industrial AI. Industrial artificial intelligence is defined as a 'systematic discipline focusing on the development, validation, deployment, and maintenance of AI solutions (in their various forms) for industrial applications with sustainable performance' (Peres et al., 2020). AI technologies can enhance resilience, support work processes, improve product quality, and thus enhance competitiveness. However, there is limited empirical research on the factors that influence the successful implementation and operation of industrial AI services as a whole. Particularly, little attention is paid to the factors of success (Kutz, Neuhüttler, Spilski, Lachmann, 2022).

Stanford Professor John McCarthy, who described it as 'the science and engineering of making intelligent machines', established the first definition of Artificial Intelligence in 1955 (McCarthy et al., 2006). However, during this period, there has been a digital revolution driven by both industrial reforms (Abuže & Ļubkina, 2021) and the COVID-19 pandemic (Vindača & Ļubkina, 2021), as well as the accessibility of tools like ChatGPT. As a result, AI is now defined as the ability of systems to correctly interpret external data, learn from that data, and utilize the acquired knowledge to achieve specific goals and perform tasks, using flexible adaptability (Kaplan & Haenlein, 2019). Artificial intelligence involves the simulation of human intelligence processes with machines, including computers (Burns et al., 2023).

The concept of AI is widely used in various industries; however, in this study, it is primarily viewed as AI in Education (AIED). Machine learning is a subfield of artificial intelligence capable of processing vast amounts of data and discovering characteristic patterns. Machine learning makes the process automatic for decision making and analyzed the individual student data (Asthana & Hazela, 2019).

There are still relatively few studies on the possibilities of AI in education. The aim of this article is to provide an overview of the use of artificial intelligence tools in higher education, particularly in fields like engineering and design, and to conduct an analysis of the level of user readiness for their application. This is done to assist teachers and students in exploring and understanding the latest AI opportunities, promoting an increase in readiness, while considering potential AI challenges in the future.

## Literature review

AI tools are increasingly shaping the landscape of higher education, transforming traditional teaching and learning methodologies. The International AIED Society (IAIED) was launched in 1997 and publishes the International Journal of AI in Education (Zawacki-Richter et al., 2019). IAIED is an interdisciplinary community in the fields of computer science, education, and psychology, with the goal of promoting research and development of interactive and adaptive learning environments (International AIED Society, n.d.). This association underscores the relevance and importance of the topic. In systematic literature review, Crompton & Burke (2023) have examined publications from 2016 to 2022, highlighting areas in education where AI is used, including (1) assessment/evaluation, (2) prediction, (3) AI assistants, (4) intelligent tutoring systems, and (5) student learning management.

As one of the first AI tools available to the wider public, ChatGPT, a chatbot, rapidly gained global popularity (OpenAI, 2022). An AI chatbot is software that utilizes artificial intelligence to communicate with people through text or voice interactions. Chatbots can simulate human dialogues by providing responses to questions and performing specific tasks. They are widely used in various industries and tasks, including education. AI chatbots have the ability to learn from previous communication experiences, allowing them to become increasingly effective and adaptable to people's needs (Madhu et al., 2017). A summary of chatbots is available in Table 1.

*Table 1 AI chatbots (made by authors)*

AI tool	Cost	Usage
ChatGPT <a href="https://chat.openai.com/">https://chat.openai.com/</a>	GPT-3.5 – free GPT-4 – paid model	Chatbot – content creation, translation, writing code, debugging etc. (Stephens et al., 2023).
Google Bard <a href="https://bard.google.com/">https://bard.google.com/</a>	Free	Language Model for Dialogue Applications – LaMDA, explore creative ideas (Stephens et al., 2023).
Bing Chat <a href="https://www.bing.com/">https://www.bing.com/</a>	Free	OpenAI GPT-4 chatbot; in the responses, references are also provided to the sources from which the generated text is taken (Stephens et al., 2023).

Researches emphasize the positive impact of ChatGPT (available to the wider public since December 2022) on the study process, stimulating the transformation of higher education (Dai et al., 2023; Schön et al., 2023). With the help of this tool, learning analytics is improved, idea generation is facilitated, and educational accessibility is expanded. This tool provides real-time responses, which is a crucial aspect for students as it offers immediate feedback.

ChatGPT's user interface enables communication in a conversational manner initiated by the user. Consequently, students need a set of skills to effectively engage in dialogues with the chatbot (Dai et al., 2023). However, ChatGPT may not inherently possess originality, human intuition, or critical thinking when generating ideas. In such cases, ChatGPT's output can serve as a tool to encourage and facilitate idea formation. Nonetheless, students will need to rely on their knowledge and judgment to assess the output and generate fresh and innovative ideas (Dai et al., 2023). On the other hand, Bard, developed by Google (Schön et al., 2023), initially launched in beta version in the United States and the United Kingdom. Since July 2023, it has become available in European countries as well (Stephens et al., 2023). Furthermore, Google Bard made a significant announcement on July 13, 2023, introducing a major update that permits the utilization of images in conjunction with text. This enhanced tool can analyze visual content, offering descriptions such as image captions and responding to queries by leveraging visual information (Qin et al., 2023).

*Table 2 AI research tools (made by authors)*

<b>AI tool</b>	<b>Cost</b>	<b>Usage</b>
Consensus <a href="https://consensus.app/">https://consensus.app/</a>	Various plans (Free, Premium, Enterprise)	Search engine that uses AI to obtain answers from research papers (Consensus, 2023).
Elicit.org <a href="https://elicit.org">https://elicit.org</a>	Various plans (Free, Pay as you go, Enterprise)	Developed by Ought, the program is capable of automating time-consuming research tasks, such as article summarization, data extraction, and synthesis (Whitfield & Hofmann, 2023).
Scite.ai <a href="https://scite.ai">https://scite.ai</a>	Paid	A web browser tool based on machine learning algorithms that allows for easily visualizing how articles are cited in other papers, whether these citations support or express differing opinions, thus confirming the article's impact (Brody, 2021; Bakker et al., 2023; Nicholson et al., 2021).
Research Rabbit <a href="https://www.researchrabbit.ai/">https://www.researchrabbit.ai/</a>	Free	A web citation-based literature mapping tool. The purpose of such a tool is to optimize the time spent searching for references when starting to plan research or conducting a literature review (University at Buffalo, n.d.).
ChatPDF <a href="https://www.chatpdf.com/">https://www.chatpdf.com/</a>	Various plans (Free, Paid)	Assists in reading PDF files using ChatGPT and effortlessly comprehending and analyzing PDF files (Zoew, 2023).

Research plays a significant role in higher education, and it is argued that research and studies should be closely integrated. Research can assist students in developing critical thinking, effective analysis, research, and communication

skills, which are in high demand on a global scale (University of Skovde, 2016; Jensen & Dikilitas, 2023). Therefore, AI tools designed to support research are reviewed, see Table 2.

AI is not a competitor to educators, it is a valuable tool capable of performing and enhancing a wide range of operations carried out at universities, facilitating the organization of an effective educational process. The effective use of AI technologies in higher education allows for the selection of the most optimal teaching strategies tailored to students' individual abilities and needs, as well as to the requirements of the job market (Dilmurod & Fazliddin, 2021). AI tools are essential in education because they can help improve the learning experience and promote student engagement. For instance, AI can assist in personalizing educational programs to match students' needs and abilities, as well as provide students with feedback on their performance (UNESCO, n.d.). Table 3 summarizes some of the AI tools in education.

*Table 3 AI tools for education (made by authors)*

<b>AI tool</b>	<b>Cost</b>	<b>Usage</b>
Gradescope <a href="https://www.gradescope.com/">https://www.gradescope.com/</a>	Paid	The tool enables students to assess each other while simultaneously providing feedback, often a time-consuming task without AI tools. Gradescope relies on a combination of machine learning (ML) and AI (McFarland, 2023).
Fetchy <a href="https://www.fetchy.com/">https://www.fetchy.com/</a>	Paid	AI virtual assistant for educators. From classrooms to homeschooling (Fetchy, 2023).
Plaito <a href="https://www.plaito.ai/">https://www.plaito.ai/</a>	Various plans (Free, Paid)	AI-powered learning platform that helps students learn more effectively (Plaito, 2023).

AI image editing tools have become a relevant solution in the field of education, as they can assist students and educators in improving the quality and reducing the time required for manual image editing. AI Tools Arena has compiled AI tools for various industries and tasks, including animation generator, automation, business, chatbot, copywriting, education, entertainment, finance, image editor, image generator, etc. (AI Tools Arena, 2023b) (see Table 4).

Table 4 *AI tools for image editing and generation (made by authors)*

Title	Cost	Usage
Cutout AI <a href="https://www.cutout.pro/">https://www.cutout.pro/</a>	Various plans (Free, Paid)	An AI-based platform that simplifies photo and video editing (AI Tools Arena, 2023a).
Fyilm.ai <a href="https://fyilm.ai/">https://fyilm.ai/</a>	Various plans (Free, Lite, Pro, Team)	An AI-based colour grading platform. Colour classification is one of the most important aspects of filmmaking and photography (Fyilm.ai, 2021).
MidJourney <a href="https://www.midjourney.com">https://www.midjourney.com</a>	Paid	Generative AI tool for crafting images from text inputs (Midjourney, n.d.).
Dall-E <a href="https://openai.com/dall-e-2">https://openai.com/dall-e-2</a> <a href="https://www.bing.com/images/create">https://www.bing.com/images/create</a>	Paid, Free in Bing Chat	Text-to-image model developed by OpenAI using deep learning methodologies to generate digital images from natural language descriptions (Dall·E 2, n.d.).

Using Google Trends, a graph was created (see Figure 1) that illustrates the global interest over a year (10.09.2022 – 09.30.2023) in AI terms - ChatGPT, Bard, Bing Chat, Consensus, and AI. The *Google Trends Explore tool* is indexed and normalized. Indexing entails the utilization of data sourced from a representative, unbiased sample of Google searches, thereby precluding the availability of precise numerical figures for specific terms or topics. To address this limitation and assign meaningful values to terms, a scale from 1 to 100 is employed, with 100 representing the highest level of search interest within the chosen time and location. Normalization is the methodology used to gauge search interest in a given topic or query. Rather than focusing on the absolute number of searches, this process analyzes the proportion of searches related to that particular topic concerning all searches conducted during the specified time and location (Google, n.d.).

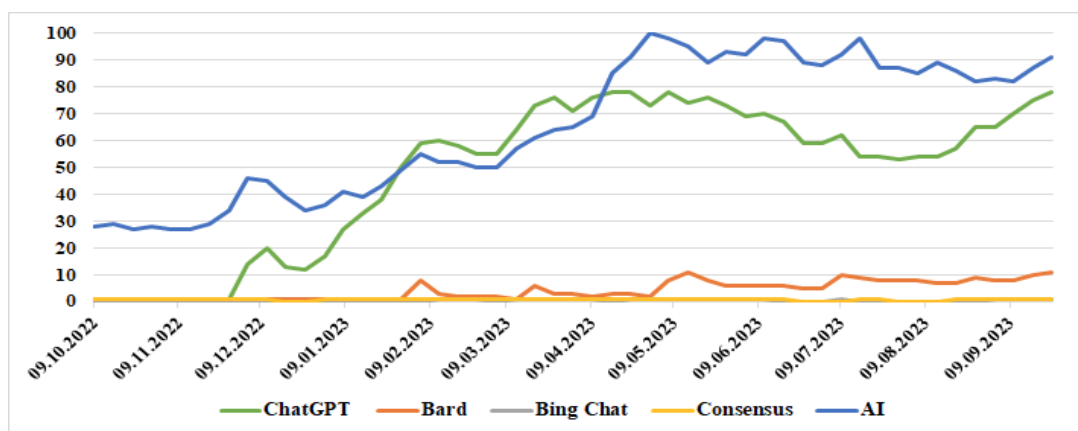


Figure 1 *Interest during the last year (09.10.2022 - 30.09.2023) in AI and its tools in the world (Generated with Google Trends by authors)*

The opportunities for using AI tools are particularly crucial in design and engineering studies because, quite often, traditional product design methods fail to deliver the desired results due to subjectivity, limited research time, and data constraints. Thus, advancements in AI and big data open up possibilities for employing AI-driven product design methodologies, with a significant impact on engineering and product design. AI does not replace traditional engineering and design education, which provides students with a strong foundation in general principles and techniques, but integrating AI into education in these areas offers several advantages: the ability to automate repetitive tasks, the capacity to analyze data, such as user data, and AI assistance in generating ideas using machine learning algorithms. This saves time and allows a focus on more creative aspects. Overall, AI and traditional engineering and design education complement each other successfully.

As an example, the opinion of design educators how AI is being integrated into the higher education system and what they are doing to ensure it is ethically and responsibly used (see Table 5).

*Table 5 New principles for how AI could be used ethically in universities have been published by the Russell Group institutions (Bamford, 2023)*

Design educators	Opinion on AI
University of Leeds associate professor in graphic design Dr Catherine Stones	There are certainly new creative skills to teach, such as ‘Prompt Engineering’. Students though still need high levels of visual literacy to interpret and curate AI generated images. Vital critical skills rely on an excellent grounding in design knowledge, practice and understanding. Design has a long history of embracing technological change. I believe the answer is to support staff and students to learn, question and stay AI-agile.
Ravensbourne University London associate professor and head of Creative Lab Derek Yates	This is a transformative moment, and it brings with it risk and opportunity in equal measure. Yes, we need to be aware of the risk, but we also need to embrace the full range of opportunities. My feeling is that AI has the potential to open up our industries to a much wider range of voices. The importance that traditional creative craft skills play in creative education often provides a barrier to those whose upbringing has not valued those skills. In the new world of AI if you’ve got something to say, you won’t need to be able to draw or use cameras to give your ideas form. As educators we will need to learn to harness and shape this raw creativity and I wholeheartedly embrace that challenge.”
Kingston University associate professor and acting head of School of Design Rachel Gannon	At the centre of the discussions on the impact of AI on design education are AI Image generation tools (e.g. MidJourney and Dall-E). However, the final outcome of any design project forms just a limited part of a wider process. Design thinking, criticality, imaginative extension, speculation, observation, storytelling and empathy are just a few of the skills employed by designers that are, for now at least, unreproducible by AI.

Manchester Metropolitan University deputy head of design David Grimshaw and reader in design Ian Whadcock	Ultimately AI is a tool, and as with all tools it will demand students and staff to develop their skills and judgement in its application. As a quantitative not qualitative tool, students will need to use their knowledge of wider contextual social, environmental, and functional issues to ask AI the right questions. This knowledge coupled with aesthetic judgement will help them develop high quality, original and individual outputs. It is this knowledge based, human, and qualitative approach that is central to design education, and as such AI will support this process and raise standards even higher.”
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In general, it can be seen that opinions vary, but the unifying aspect is the readiness to accept this challenge, the necessity of deep expertise in the field of study, the required skills in the design thinking process, which, at least for now, AI cannot provide, as well as support to create a high level of proficiency in working with AI.

### Methodology

The research aim is to analyze the aspects of AI tool usage in higher education and to conduct an analysis of the user readiness level for their application. Research methods: empirical – focus group discussions, expert interview data analysis, online survey.

Research basis: 44 students of Rezekne Academy of Technologies from various study programs “Fashion Design and Technology”, “Interior Design”, “Design”, “Primary Education Teacher”, “Programming and computer network administration”, “Engineer of Programming”, “Laser Technologies”, “Modelling of Socio-Technical Systems”; research period: autumn of 2023. Thus, representing all levels of study and various courses. Of the participants, 18 were male, and 26 were female, with an average age of 24.61 (mean = 24.61, SD = 7.87).

Qualitative data processing and analysis methods are used. Collection of qualitative data is ensured by 3 focus group discussions (length 1 hours) in student groups, performing the assessment of AI tools using in education process. The respondents assess current issues in AI - their knowledge in using AI tools both in everyday life and in the educational process, expressing their opinion on the opportunities and challenges of implementing AI in education.

Five experts (4 lecturers and 1 representative from a company that works with AI and ML) take part in the research. The selection of experts is determined by their corresponding academic and professional competency. Expert interviews are conducted using a questionnaire which includes 19 questions and the data obtained are summarized and analyzed.

The content of discussions and interviews is structured according to the functional, ergonomic, and service components of the requirements for obtaining



results. Focus group discussions were held face-to-face, recorded, then transcribed and analysed. After the focus group discussions, a survey was also conducted to collect quantitative data. Quantitative data were collected using the online platform QuestionPro, evaluated on a 5-point Likert scale, and for data analysis, only descriptive statistics were utilized with SPSS and Microsoft Excel programs.

### Research results

Analyzing the obtained opinions and data, it can be concluded that students highly rate their knowledge of AI with an average value of 4,52 on a 5-point Likert scale (mean = 4,52, median = 5,00, SD = 0,70). On the other hand, the concept of machine learning is rated slightly lower with an average value of 3,45, which is understandable since the term is specific to the IT industry (mean = 3,45, median = 4,00, SD = 1,40). Although some students admit that the concept of machine learning is unfamiliar, others have heard of it and can explain it to some extent. Focus group discussion participant's opinion about ML and AI.

*ML, in my understanding, is a data-analyzing framework that can provide summary information about collected data. AI, or artificial intelligence, is attributed with the characteristics of human intelligence. I would say that if ML is more of the right, analytical hemisphere of the brain, then AI is the left, creative and somewhat unpredictable hemisphere of the brain.*

Participants in the focus group discussion were asked a question about the use of AI in everyday life, with a mean value of 3,70 on a 5-point Likert scale (mean = 3.70, median = 4.00, SD = 1.44). On the other hand, ICT students admitted that they have learned AI as part of the study course.

Students note that they use AI for both work-related and daily tasks, as well as for their studies, employing AI tools for information retrieval, translation, learning, image generation, optimizing device parameters, text-to-speech, chatbot use, and idea generation. However, not all students have tried to use AI tools yet, and therefore, they lack any experience in working with them.

In the focus group discussions, participants were asked to evaluate AI tools described previously, and the most frequently used ones are ChatGPT, Google Bard, with some having used Bing Chat, Consensus, ChatPDF, and Plaito. However, in most cases, the tools presented are either unfamiliar or not in use (see Figure 2).

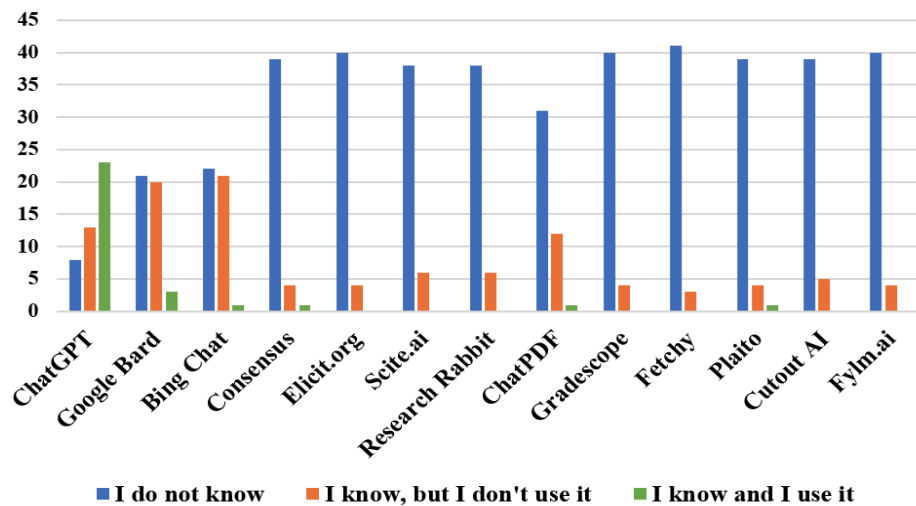


Figure 2 *Relative distribution of the students self-evaluation of AI tools using (made by authors)*

In the focus group discussions, other AI tools were also mentioned, which were not initially included in the study, such as *GitHub CoPilot*, which is useful for programmers, and *Phind*, a search engine and programmer's assistant that can be used in conjunction with the *VS Code* extension (Phind, n.d.).

The majority of students believe that AI technologies can enhance the study process, with an average score of 3,95 on the Likert 5-point scale (mean = 3,95, median = 4,00, SD = 0,83). In the expert group, support is not unambiguously expressed; however, it is higher compared to students, with an average score of 4,20 on the Likert 5-point scale (mean = 4,20, median = 5,00, SD = 1,10). Examples of students' experiences with AI use in the educational process were summarized:

- Get detailed information;
- Summarize information;
- Ask supplementary questions to the AI;
- Create original, unique tasks;
- Create presentations, visual materials;
- Obtain substantial amounts of information sources;
- Get information faster and more conveniently;
- Support tool for task-solving, problem-solving;
- Process and collect information;
- Find errors;
- Generate texts, ideas, images;
- Automate tasks;
- Prepare projects.

Students acknowledge that AI tools are successful sources of inspiration for generating new ideas and perform excellently with substantial amounts of information, thus enhancing productivity. The group of experts also concurs with

these educational enhancements through the use of AI tools. Experts emphasize that AI tools provide a personalized approach to knowledge acquisition. Industry expert's perspective on AI usage:

*ChatGPT helps practically learn programming and code testing. With ChatGPT, I can discuss scientific discoveries, collaboratively develop hypotheses, and experimental plans. With the help of ChatGPT, I have developed a ChatGPT-based robot that assists me in managing operational matters at my company, such as determining the status of various tasks, delegating assignments, and tracking their progress.*

Recommendations from student and expert focus group discussions on the use of AI in the educational process.

- Do not prohibit the use of AI but encourage collaboration and a critical attitude towards AI-generated ideas.
- Organize informative events, possibly in the form of courses, on the possibilities offered by AI and its use in the educational process, so that students have the competence to use AI tools.
- Provide competitive access to AI tools during studies.
- Recommendations at the ministry level on how educators can use AI tools and develop recommendations for students.
- Verify the correctness of AI ideas/texts by checking the information themselves.
- Motivate students to use AI tools, for example, by preparing their own research papers.
- Focus more on the development of human natural abilities rather than superficial use of IT.

Students rate their knowledge and skills for using AI technologies in the study process as average, with a mean value of 2,95 on a Likert 5-point scale (mean = 2,95, median = 3,00, SD = 1,38), which is also confirmed by descriptive statistics for the question "Do you feel the need to supplement your knowledge and skills for using AI technologies in the study process if there were such a need?" where the mean value is 4,00 on a Likert 5-point scale (mean = 4,00 median = 4,00, SD = 0,94).

Researchers see both opportunities and challenges in the use of AI in education. However, education policymakers must not ignore the need for AI integration in higher education, as students need to be competent in working with AI according to their chosen study programs. Furthermore, ensuring that the latest technologies, including AI, are available to all students helps reduce educational and professional inequalities while promoting greater social equity (Dai et al., 2023).

Meanwhile, the opportunities for enhancing the educational process with AI have been highly appreciated, with an average score of 4,27 on the Likert 5-point scale (mean = 4,27, median = 4,00, SD = 0,85), while the challenges have been

comparatively rated lower, with an average score of 2,72 on the Likert 5-point scale (mean = 2,72, median = 3,00, SD = 1,09). Focus group discussion participants and experts expressed their opinion on the implementation of AI tools in the higher education process, opportunities and challenges are summarized in Table 6.

*Table 6 Opportunities and challenges of implementing AI tools in higher education processes (made by authors)*

<b>Opportunities</b>	<b>Challenges</b>
Wide range of materials	Information inaccuracy/false news
Promotion of development	Excessive reliance on AI tools
Individualized approach	Student self-assessment deficit, unethical use
Get new information	Incorrect text interpretation
Acceleration of work	Lack of critical thinking
Data/information processing, analysis	Lack of communication
Collective creation of new knowledge	Inability to independently analyze information, narrowing of the field of vision, and a tendency to rely on technology rather than one's own mental abilities.

## **Conclusions**

ChatGPT can be considered innovative in the educational process, prohibiting or attempting to control/restrict it would not be effective. It is necessary to focus on its use in the educational process, preparing both students and lecturers for upcoming changes and challenges in the workplace.

Researchers and educational institutions need to understand the positive and negative factors influencing the use of AI. The current research results add to the knowledge in this field. However, further research is needed to better understand the factors affecting the use of AI tools, such as the relationships and dependencies among these factors and their relative significance.

Summarizing the responses provided in the focus group discussions, respondents/students acknowledge that AI tools are successful support mechanisms in education and studies. They serve as sources of inspiration for generating new ideas, work excellently with large amounts of information, thereby enhancing productivity. The expert group agrees with these improvements in education through the use of AI tools and emphasizes that AI tools provide a personalized approach to knowledge acquisition. Overall, experts are unanimous that the integration of AI into the education process will create opportunities to develop unique practical tasks and provide individualized access. However, it also presents challenges in balancing technology integration in education without losing the human factor. In summary, AI tools can enhance the

learning process, but there is a need to supplement knowledge and skills for the use of AI technology.

Interviews and discussions provided insights into respondents' views on the opportunities and challenges of AI. It should also be noted that the sample in this study is limited: AI experts and potential users in the field of engineering and design education. All individuals involved in the use of AI capabilities, especially end-users, should be interviewed in future research to obtain a more comprehensive and in-depth understanding. Additionally, by utilizing different research methods, further supplementary data could be obtained for analysis.

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# PORTFOLIO OF RESEARCH PROJECTS AS A PREROGATIVE OF UNIVERSITIES TO ENSURE FINANCIAL AUTONOMY

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**Abstract.** *The growing role of higher education in modern society and the expansion of the boundaries of science require a change in the models of university funding through the integration of certain corporate governance mechanisms. Of particular importance is the ability of universities to attract funding, including from private sources, by combining basic and applied research. It is critical for universities to find an optimal balance between basic and applied research when making decisions on launching new projects and programmes or adjusting existing ones.*

*The purpose of the article is to determine the peculiarities of forming a balanced portfolio of research projects to ensure the financial autonomy of modern universities.*

*The scientific research uses general scientific and special methods, in particular: analysis and synthesis; comparison, systematisation and generalisation, and the graphical method to clearly present the theoretical and practical provisions of the scientific article.*

*The proposed approaches to assessing the university's portfolio of technological innovation developments will contribute to the efficient use of limited resources, prioritisation, risk analysis and monitoring of results in the short and long term. This will create a network of partners to share knowledge, research and resources.*

**Keywords:** *university funding models; basic and applied research; research projects; R&D technology portfolio; financial autonomy.*

## Introduction

A portfolio of research projects is an important tool for an entrepreneurial university to attract funding in the modern era. It reflects the potential of the university in the field of scientific research, technological innovation and knowledge transfer. A research project portfolio can include a wide range of research areas, from basic research to applied projects. It can be composed of the university's own research programmes, joint projects with industrial partners, and commissioned research from external organisations. Creating a research portfolio requires effective organisation and coordination of efforts by the university team. It should be developed taking into account the scientific state of the industry, the needs of customers (including industrial companies) and the



capabilities of the university. Successful projects can become the basis for creating start-ups, patents, opening new markets and attracting investments. This contributes to both academic advancement and economic growth in the region where the university is located.

The purpose of the article is to determine the peculiarities of forming a balanced portfolio of research projects to ensure the financial autonomy of modern universities. The study uses general scientific and special methods, in particular: analysis and synthesis; comparison, systematisation and generalisation; graphical method.

It should be noted that the portfolio of research projects allows the university not only to develop its scientific base, but also to become involved in the implementation of projects that have practical importance and commercialisation potential. The university can form its portfolio of research projects through active cooperation with higher education institutions, companies, research institutes and other target organisations. The financial autonomy of the university can be ensured by attracting funding from external sources, such as grants, government programmes, contracts with private companies, etc. The task of the university in terms of ensuring financial autonomy is to create an effective system of internal project management, identify and promote potential scientific developments, as well as continuously improve the processes of commercialisation and technology transfer.

### **Literature review**

The role of universities as major centres of research has been debated in recent decades. In the early 2000s, the concept of “university research” emerged, focusing mainly on solving industrial problems and practical implementation of the results obtained. Under this approach, basic research by universities, which is not explicitly applied, lost its importance as a major source of knowledge. Strengthening direct cooperation between universities and industry stimulates more active participation of universities in practical problem solving. In this approach, universities lose their monopoly position in knowledge production, giving way to other actors, such as research institutes, think tanks and other (Tijssen, Winnink, 2016).

The “triple helix” model of interaction between industry, government and universities as elements of the national innovation system (Etzkowitz and Leydesdorff, 2000) assigns the latter a more important role in innovation development and economic growth. Acting as “generators of innovation” (Xu et al., 2018; Rucker Schaeffer et al., 2018), universities around the world are undergoing a transformation – a shift from conventional teaching to a

combination of educational and research activities with a pronounced practice-oriented component.

The current scientific and technological challenges are encouraging academic institutions to switch to practice-oriented research, i.e. practical research funded by industry (Tijssen, Winnink, 2016). In such circumstances, academic science is faced with the task of finding an optimal balance between basic and applied research.

Basic research is an experimental or theoretical activity aimed at gaining new knowledge about the causes of various phenomena. In turn, applied research is aimed at achieving specific practical goals or solving specific problems.

The paper (Bentley et al., 2015) presents the results of a comprehensive analysis of the activities of scientists from 15 countries. The authors analysed the differences in the orientation towards basic or applied research and found significant differences in this regard between different countries. For example, Australian, American and Hong Kong scientists were more likely to specialise in applied research, while Finnish, Norwegian and Dutch scientists were more likely to specialise in basic research. A special place is occupied by China and Malaysia, as Chinese scientists traditionally show a high level of interest in applied research, due to specific professional ethical principles in solving social problems.

The mission of universities is becoming increasingly important in the context of economic development, as it goes beyond the usual teaching of students and the conduct and execution of research. Governments are beginning to see universities as institutions that can contribute to social progress, promote social mobility, train researchers and innovate according to needs (Katalevsky et al., 2022). An important task is to strengthen the link between universities and society in order to transfer university skills and knowledge to social needs. Active engagement between universities and knowledge users is expected to lead to improved products, services and systems, as well as to the creation of stable and well-paid jobs. (Crawley et al., 2020).

### **Methodology and research results**

The scientific research uses general scientific and special methods, in particular: analysis and synthesis; comparison, systematisation and generalisation, and the graphical method to clearly present the theoretical and practical provisions of the scientific article.

Higher education institutions in economically developed countries are currently undergoing significant transformations related to the revision of the role of universities in promoting socio-economic and innovative progress. Universities in these countries act as initiators of innovation processes, while the

state and business act as customers, consumers and co-investors of innovative developments. New research areas considered by modern universities include not only technology development and transfer, but also commercialisation of research results, introduction of innovative products to the market, creation of start-ups, formation of new innovative enterprises, and management of intellectual property for financial gain.

Modern universities carry out their mission in the field of social and economic development by intensifying integration processes that promote synergies through coordination of efforts in education, science and business in the interests of the state and society as a whole.

Modern universities are under the influence of various socio-economic and technological factors, which leads to an active transformation of their tasks. A study of the evolution of university models (Etzkowitz and Leydesdorff, 2000) has identified the following models: university 1.0, which functions as an education centre with the main task of ensuring the transfer of knowledge; university 2.0, which focuses on research and technological progress; university 3.0, focused on entrepreneurship and based on the Triple Helix concept, aimed at commercialising scientific achievements; University 4.0, which actively interacts with the outside world, promotes social and societal progress and is closely linked to industry, built on the basis of digitalisation of processes.

The emergence of modern universities implementing the 3.0 and 4.0 models is due to a number of factors. One of them is the need for continuous development of skills and qualifications acquired through formal education. The growing societal demand for active applied research is fostering deep industry partnerships and reducing the time required to turn scientific and innovative ideas into commercial outcomes. In addition, the development of digital technologies is another important factor driving this transformation in the university environment.

The majority of higher education institutions located in economically developed countries and ranked highly in global rankings embody the concepts of 3.0 and 4.0 universities. They are not only productive in research, but also actively promote business education, disseminate practical business experience and effectively commercialise their research, which contributes to the country's economic growth.

Collaborative research between universities and commercial institutions can have a significant impact on society and the economy. When academic institutions and commercial organisations collaborate on research, it facilitates the exchange of knowledge between different sectors. Academic scientists can provide new insights and scientific discoveries, while commercial partners have the opportunity to put this knowledge into practice and create innovative solutions and products. This interaction can lead to significant benefits. Firstly,

academic institutions can receive financial support for their research and additional means for its implementation. Commercial organisations, on the other hand, gain access to the latest scientific research and can give their businesses a competitive edge. Further benefits include the possibility of creating technological innovations, expanding markets, improving the quality of products and services, and increasing the competitiveness of companies. In addition, this type of collaboration can stimulate the development of scientific research and facilitate knowledge transfer between the academic and commercial sectors. Involvement of relevant stakeholders, ensuring interaction and information exchange, and understanding the needs of each party are key to the successful commercialisation of academic research.

A summary of the effects of collaborative research on academic institutions and commercial organisations is presented in Table 1.

*Table 1 The effects of collaborative research on academic institutions and commercial organisations (compiled by the authors)*

<b>Effects of collaborative research in academia and commercialisation</b>	
<b>Sphere of effects</b>	<b>Description</b>
<b>Academic activities</b>	
<b>Publications</b>	<ul style="list-style-type: none"> <li>- Increase in the number of scientific publications that answer new research questions raised by corporate partners;</li> <li>- Increased efficiency through more precise selection of models and niches by coordinating research and practice of enterprises and organisations;</li> <li>- Reducing the time to obtain scientific results and accelerating their publication thanks to the resources of investors.</li> </ul>
<b>Areas of research</b>	<ul style="list-style-type: none"> <li>- Expanding the range of research using resources obtained through cooperation with industry;</li> <li>- New areas of applied research that are of interest to the production sector;</li> <li>- New areas of research, the development of which became possible due to cooperation with industry and the presence of a user – a long-term partner.</li> </ul>
<b>Teaching</b>	<ul style="list-style-type: none"> <li>- Transfer of scientific and technological knowledge created jointly with industry to students and postgraduates;</li> <li>- Use of equipment provided by partner companies in teaching;</li> <li>- Using the experience of joint research as a model for organising and managing the educational process and applying the knowledge gained.</li> </ul>
<b>Commercialisation</b>	
<b>Start-ups</b>	<ul style="list-style-type: none"> <li>- Scientists create start-ups based on the knowledge gained through joint research without competing with partner firms.</li> </ul>
<b>Patents and new services</b>	<ul style="list-style-type: none"> <li>- Creation of new intellectual property, licensing;</li> <li>- Application of knowledge gained from partner firms (analytical control methods) to provide services to other organisations; additional resources for research.</li> </ul>

Changes in the role and mission of universities, the transfer of active participation in the development of society instead of focusing on teaching and research, leads to a necessary reorientation of the funding model. Although budgetary funds remain the basis for university research, public funding for universities is declining, while the role of industry and other forms of public-private partnerships is growing. Compared to the US and Western European countries, where private capital plays a predominant role, the share of state support in Ukraine is estimated at 60-70%. The ever-tightening financial environment is forcing universities to actively seek forms of international cooperation to increase the profitability and attractiveness of additional external budgetary resources (Table 2).

*Table 2 Mechanisms and tools for expanding the financial autonomy of universities (compiled by the authors)*

Mechanisms and tools expansion of financial autonomy of universities	Models of public administration		
	State administration	Public management	Effective governance
<b>Regulation: Legal status</b>	State-financed institution	Public institution / organisation Corporation (public, private) Non-profit / non-profit organisation	
<b>Type/methods of distribution funding</b>	Itemised budget (Estimates)	Block grant	
<b>Forms of financing</b>	Direct (budget / state order) state order)	Direct (budget, project, result-oriented, targeted)	
	Indirect (voucher, loan, grant and scholarship support)		
<b>Accountability</b>	Control	Supervision	Monitoring

Depending on the source of capital, there are internal (budgetary) and external (private) models of financing in the university sector. Basic funding ensures the stability of the university system, its basic infrastructure and remuneration of academic staff, while dependence on external funding gives it greater autonomy. With this in mind, universities that receive funding from external sources are more flexible in implementing new initiatives compared to those that rely on budgetary funding.

In many educational institutions around the world, financial expenditures exceed the amount of available funding, which puts the administration in front of the task of finding additional sources of funding (Lyken-Segosebe and Shepherd, 2013). One of the possible ways to achieve this goal is to develop educational programmes that promote research in various fields and use best corporate practices in the process of educating students and adapting them to new challenges and opportunities. Focusing on market-oriented educational

programmes designed to meet the demand for specialised knowledge and skills of employees can not only have a social impact, but also help solve the financial problems of colleges and universities that demonstrate a willingness to respond effectively to market signals.

Attracting and allocating funding between different research areas remains a pressing issue for universities due to limited resources. Among the works on this topic (Wells, Wells, 2011), some are devoted to the evaluation of academic educational programmes using business tools – product portfolio models. The most likely models of this kind are the General Electric McKinsey model and the growth/market share matrix developed by the Boston Consulting Group (BCG). Although successfully used as strategic analysis tools, these models are not widely used in the academic context. One of the exceptions is the study (Wells, Wells, 2011), which proposes the Academic Programme Portfolio model (APPM), which is essentially an adaptation of the GE/McKinsey strategic portfolio matrix model, widely used by production organisation consultants. The advantages of the APPM include the use of only two dimensions – the attractiveness of educational programmes and the competitiveness of the educational institution – which are easy to understand and measure, and therefore to integrate into the university's strategic analysis and planning system.

The study (Arman, 2019), based on the Portfolio Evaluation Matrix (PEM), presents an analysis of a specific situation – the allocation of a limited amount of resources among the strategic research initiatives of the Kuwait Institute for Scientific Research (KISR). The portfolio assessment matrix is a diagram of “a two-dimensional matrix based on two criteria: the potential effect of a decision over the next five years and the ability of the programme staff to deliver what is promised” (Arman, 2019, p. 154). The use of this tool helped the think tank focus its portfolio on long-term goals. However, in essence, this model is intended for forward planning based on a subjective assessment of results.

The idea of looking at the university through the lens of portfolio theory is quite effective. According to the authors of Crawley et al. (2020), it is advisable for research groups and universities to have a balanced portfolio that will create knowledge to achieve short-, medium- and long-term economic development. Portfolio management has become important, bringing together a number of key decision-making areas, each of which is associated with challenges: selecting and prioritising projects, allocating resources between them, and implementing the strategy.

The modern theory of the investment portfolio was formulated by the famous American economist Harry Markovitz, who was awarded the Nobel Prize for his contribution to economic science in 1990. His most valuable development was the concept of portfolio diversification, which allows reducing the overall risk of portfolio investments at the expense of assets (Mangram, 2013).

The success of a modern university depends on a variety of factors. First of all, the effectiveness of university research and development depends on the diversification of the portfolio of technological innovation projects. This implies the inclusion of both fundamental and applied research, as well as a wide range of unrelated scientific areas.

It should also be emphasised that a balanced portfolio of technological innovation developments should be formed, combining projects and competences of different market maturity. It is also important to ensure a reasonable balance between short- and long-term projects.

The success of the university also depends on the coordination of the research portfolio with the educational programmes to maximise their social utility. This means developing educational programmes that are in line with scientific achievements and the needs of society, which allows for the effective use of research results in the educational process.

In general, the success of a modern university largely depends on the ability to diversify technological innovations, ensure that projects are balanced in terms of their implementation, and coordinate the research portfolio with educational programmes to achieve maximum social benefit.

Researchers (Wells, Wells, 2011) proposed to use the Academic Programme Portfolio Model (APPM) approach to university academic programmes. The APPM methodology is used to evaluate university academic programmes by taking into account the parameters of their market attractiveness and potential. This approach is an adaptation of the GE/McKinsey product portfolio matrix. The market attractiveness and potential of a programme are measured on a five-point scale and combined into a portfolio matrix. The analysis can be conducted at the faculty level (comparing faculty or research areas) or between faculty programmes. The APPM methodology allows you to assess the strategic orientation of academic programmes in relation to the university as a whole or a particular faculty. Managers can simultaneously evaluate several academic programmes in terms of their strategic focus, resource allocation, financial return and importance to the university.

The proposed toolkit used in decision-making aimed at optimising market-oriented academic programmes includes quantitative, work-based methods (Burgher and Hamers, 2020). This approach aims at achieving optimality in the financial and non-financial aspects of university portfolios that include technological innovation and market-oriented curricula. Both approaches are based on maintaining a balance between these aspects in order to achieve the strategic goals of universities, ensure financial stability and meet market demand for their services.

The study (Burgher, Hamers, 2020) presents methods for quantitative parameterisation of the qualitative characteristics of market-oriented study programmes based on a model of strategic planning in the higher education

sector through the optimisation of academic portfolios. The results of applying the model are the implementation schedule and the plan for optimising such programmes and portfolios. The approach proposed by reputable researchers (Katalevsky et al., 2022), namely the Research Doman Portfolio Matrix (RDPM), takes into account the following parameters:

1. The use of both qualitative and quantitative methods, the latter of which allow to evaluate the facts and strategy of the university based on the results of the use of allocated financial resources.
2. Emphasis on finding an optimal balance between basic and applied research, as both are important and should not be neglected.
3. A strong focus on tracking the dynamics of scientific achievements over time, rather than on static measurements typical of product portfolio matrices.

The application of the dynamic research project management (RDPM) method over several years allows systematic assessment and tracking of progress towards achieving target areas, which provides much more accurate estimates. RDPM can be used to monitor the research and innovation sphere through several key features: first, the ranking of scientific publications in high quality journals (Q1-Q2); second, the financial return on projects (through grants from the government or funding from the industrial sector). The university administration can reward “leaders” and “punish laggards”, for example, by reallocating funding to promising research or industrial projects with the highest potential return in the short to medium term (Katalevsky et al., 2022). Thus, RDPM is an effective and simple tool for balancing the research portfolio, helping to identify and adjust research priorities at the university level, especially in resource-constrained environments.

## **Conclusions**

The main integral outcomes of an academic institution should be not only to ensure profit and increase financial flows arising from scientific activities, but also to create a creative intellectual environment conducive to supporting the active creation of new intellectual tools and innovations; to prepare the public for the comprehensive introduction of advanced technologies into everyday life.

This article attempts to explore the theoretical and practical potential of analysing the technological innovation portfolio of universities in different industries and at different stages of maturity. The approach underlying this study is based on the concept that it is critical for universities to find the right balance between basic and applied research when making decisions about launching new projects or adjusting existing programmes.

The analysis of a university's research portfolio involves a systematic assessment of achievements, such as journal publications, as well as the amount



of external funding attracted for basic and applied research carried out in specific priority areas. This analysis can be used to structure the university portfolio and develop an effective strategy for future development and investment.

To ensure efficient allocation of financial resources, it is advisable to take into account the specifics of a particular research area, the market maturity of technologies and the potential return for the university, economy and society in the short and long term, as well as the importance of research for educational programmes.

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# REFLECTION OF TRANSPORT LOGISTICS' GRADUATES COMPETENCES IN THE VACANCY NOTICES FOR TRANSPORT MANAGERS POSITIONS

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**Abstract.** *The contemporary landscape of the logistics industry is evolving, introducing fresh challenges for companies. Consequently, it is imperative to focus on the competency of employees and anticipate the skills that will be essential in the future. Therefore, it is important to not only identify professional competences of the logistics graduates but also to make sure that they coincide with the skills required by the labour market. To achieve this end, vacancy notices published in an online media (CV bank) in the last quarter of 2023 were collected and analysed. Then, the obtained results were compared to the identified competences of the graduates of Transport Logistics in 2023 at Vilnius College of Technologies and Design. The article reveals that vast majority of the graduates of Transport Logistics at the Vilnius College of Technology and Design have knowledge and skills that by large reflect the requirements laid out in the analysed vacancy notices.*

**Keywords:** *competences, skills, the point of view of employer, transport logistics manager, vacancy.*

## Introduction

Conducting the same tasks in specific job roles and assessing employees only by their position in the organizational hierarchy hinders business entities from reaching goals like growth, diversity, inclusion, and agility (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Therefore, organizations are moving towards an administering model for work performance and the employees, where competences, and not the position, play the central part of the job roles. However, acquiring skills and competences required by employers takes time and practice, and in many cases, newly graduated workforce can only boast about their graduate skills from the university or college, but not the ones sought by labour market. The graduates' employability has become a serious concern due to mismatches between the competences gained at university and competences wanted by employers (Osmani, Weerakkody, Hindi, Al-Esmail, Eldabi, Kapoor, & Irani,

2015). For many years, the link between higher education and the labour market has been in the focus of higher education institutions, government bodies and employers. According to research, identification of the skills required from professionals and labour market is important in higher education institutions to ensure that curriculum remains relevant and up-to-date, this way increasing the rates of graduate employment and attracting new students (Messum, Wilkes, Peters & Jackson, 2017). What is more, research suggests the mismatch between job requirements listed in job advertisements and the actual expectations of the employer. Such discrepancy is even more worrying, as accurate recognition of the essential skills needed in professions and industries is crucial for higher education institutions. This ensures that the curriculum stays up-to-date and relevant, graduate employment keeps rising, and study programs attract new students.

The present study examines vacancy announcements aimed at manager job seekers in transport and logistics companies in Lithuania with the aim of identifying the most sought competencies, and to determine whether the competencies of transport logistics graduates from Vilnius College of Technologies and Design align with the competencies sought by employers in the specialists of transport logistics in 2023 job market. Additionally, the results of the analysis of vacancy announcements will be compared to the results of the employers' survey to identify any mismatches between competences identified in vacancy announcements and skills required by actual employee roles.

### **Literature review**

Various researchers have explored the concept of competence from different perspectives. For instance, competency is defined by United Nations Industrial Development Organisation as a set of knowledge, features and skills that a person requires to conduct an activity within a specific job (El asame & Wakrim, 2018). Competence definition by Torkkeli & Tuominen (2002) states that competency is a cross-functional integration and coordination of capabilities (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Scholars such as Dobroszek, Mourao & Grzesiak (2019), posit that the specialists' competences play a crucial role in managing a working environment and determining an organization's competitiveness (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Some argue that the competences of logistics specialists in a company, coupled with technology investments, create a momentous competitive edge in the market, this way enhancing both the current and future service potentiality of a transport organization (Katinienė, Jezerskė, & Vaičiūtė, 2021). Liikamaa (2015) takes a different perspective, defining competence as a core characteristic in individuals that is linked to efficient job execution (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Katinienė et al. (2021) describe competence as personally applied skills, abilities, and professional knowledge needed for choosing

operational methods and performing specific types of activities or functions (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Another viewpoint characterizes competence as the capacity to carry out a particular task based on gained abilities, knowledge, values and skills. (Čižiūnienė, Vaičiūtė, & Batarlienė, 2016; Prusak, 2016, Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Vaičiūtė, Skirmantienė, & Domanska (2017) highlight competence as the manifestation of professional performance and the ability to execute assigned tasks in both real and simulated work situations (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023).

In general, competence can be stated to refer to a set of abilities, as well as special and personal skills, that aid in accomplishing assigned tasks, indicating the employee's capacity to carry out specific responsibilities.

Within the scientific literature, there are numerous classifications of competencies. In research, competencies are frequently categorized based on study-oriented, theoretical, logical criteria, such as Prior and Empirical Classification, Soft and Hard competencies, Threshold and Performance competencies (Mühlbacher, Nettekoven, & Putnova, 2009, Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). The Competence Baseline, according to Boyatzis (2008), further categorizes competences into behavioural, technical and contextual, representing a behavioural approach to emotional, cognitive and social intelligence (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). A framework provided by Goleman categorizes competences into two main groups and five subgroups. Personal competences include cognitive skills, self-regulation, self-awareness, motivation, while social competences are comprised of empathy and social skills (Liikamaa, 2015, Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Martinkus, Neverauskas & Sakalas (2002) identified several general competence types, such as personal, social, methodological, professional and management (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Personal competences involve personal development, communication with colleagues and team members, and they encompass skills like communication, delegation, cooperation, stability, creativity and self-confidence, as well as the capability to work intensively in a team. Well-developed social competences are demonstrated when working with colleagues, executives, clients, and creating a positive company climate. This includes the ability to establish contacts, present oneself, negotiate, express opinions, cooperate, ask questions. Methodical competences encompass such skills as acquiring, processing, evaluating information, providing suggestions, and contributing to the improvement of future operations. Professional competences require knowledge, preparation and skills it takes to carry out specific professional tasks, requiring expertise, experience, and product knowledge. Management competences incorporate ability to oversee a specific professional area or organization, ensure company results, production

supply, foster innovation, strategic reasoning and planning, and motivate employees (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023).

In transport logistics, an extremely agile industry, skillset and competencies of transport managers, are very important. According to Puodžiukienė & Aksomitienė (2019), the primary workload and profit-generating tasks in Lithuanian transport companies typically rest on transport logistics managers (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Consequently, the competence level of employees and their ability to promptly adapt to market changes are of a tremendous importance. The review of various research reveals that a number of studies targeted skills and competences required in Business field. Chang & Lin (2018) presented a framework encompassing 83 required skills in logistics industry (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). Vaičiūtė et al., (2017) identified the following three main competence groups: special competences, social competences, personal competences (Ginavičienė, Piščikienė & Sprogytė-Bredelienė, 2023). For the purpose of this research, personal competences, social competences and professional competences were taken as the main skillset categories, as they were consistently distinguished by all researchers (Puodžiukienė et al., 2019; Chang et al. 2018; Vaičiūtė et al., 2017; Liikamaa, 2015)

*Table 1 Competences (prepared by the authors)*

<b>PERSONAL COMPETENCES</b>	<b>SOCIAL COMPETENCES</b>	<b>SPECIAL COMPETENCES</b>
Responsibility	Knowledge of foreign language	Planning
Creativity	Leadership skills	Employee work organization
Initiative	Collaboration /Team	Quality assurance management
Commitment	Capabilities Relationship building	Supply chain management
Persistence	Organizational skills	Initiation and implementation of Innovations
Self-control	Negotiation skills	Preparation and Implementation of Projects
Self-confidence	Good computer skills	Searching new clients and carriers
Goal and result-orientation	Ability to expeditiously solve problems	Transportation management
Diligence	Management	Logistics law and regulation
Good memory	Delegation	Global logistics management

Contemporary labour market offers jobs that are very agile and require readiness to lifelong learning, adaptability and social interaction, which involves the development of skills that complement the theoretical and practical knowledge specific to the profession (Hernández-March, Martín-del-Peso & Leguey (2009). However, skills needed to gain a job appear to be different from those required once a job is secured (Messum et al., 2017). Required competences in vacancy announcements define a position, and in some cases, they are very similar for the same job description. Also, management rarely informs an employee about their expectations in writing; moreover, the needs of the company can change with time, and so the expectations may alter (Barbouletos, 2011)

Feldman et. al. research revealed that specific information provided in vacancy announcements has tremendous impact on applicants (Feldman, Bearden & Hardesty, 2006; Orme, 2008). Also, receiving up-to-date information from the employers helps higher education develop a more relevant curriculum that meets the needs of the labour market (Singh, Thambusamy & Ramly, 2014). In light of the research conducted by Elzarka & El-Nakib (2014), coherence between the expectations of employers and the competencies of students will only be achieved through constant review and update of the educational materials. Universities will only be able to develop successful content of undergraduate programs which would meet industry needs if academia is constantly informed of the competencies expected by employers. (Tsitskari, Goudas, Tsalouchou & Michalopoulou, 2017).

### **Methodology**

In order to ensure the study produced representative outcomes, a specific survey group was identified. This group consisted of employers of companies that employed the most graduates of the Transport Logistics study program of the Vilnius College of Technology and Design. In order to achieve the objectives of the study, the updated data of the 2023 study of competences of Transport Logistics graduates of the Vilnius College of Technology and Design were used.

As before, in the last quarter of 2023, representatives of transport logistics companies were provided with information on how different competencies are defined and how these competencies can be divided into three categories (Table 1). On the basis of compiled lists of competences, respondents were asked to evaluate special competences required for work, as well as social and personal competences. For the purpose of the study, 150 interviewees were contacted, 90 % of them responded. Respondents were asked to assess what competencies transport logistics specialists should possess, and to rank these competencies according to their importance. Also, the interviewees had to assess which competences are the most significant for a transport logistics manager. In order to conduct a quantitative study, a questionnaire was prepared electronically using

the questionnaire preparation website [www.apklausa.lt](http://www.apklausa.lt), a link to the questionnaire was sent to employers by personal e-mail.

Then, a sample of 150 vacancy advertisements was compiled. The advertisements were taken from CVbankas website, and addressed those job seekers who were looking for a transport managers position. Survey took into account a fact that some of the vacancies were advertised for more than one day.

The advertisements then were analyzed in light of the listed requirements, which later were categorized by using the same categories as in the employers' survey.

In the final stage of the research, the collected data were systematized and analyzed in Microsoft Office Excel. Descriptive statistics (percentage distribution) were used to analyze the results. In order to fulfill the purpose of the research, two sets of data (one based on questionnaire data, the other based on collected information about vacancy advertisements) were compared, the observed similarities and differences were identified.

## **Research results**

Individuals who have completed the Transport Logistics study program at Vilnius College of Technologies and Design engage in diverse roles. These roles encompass tasks such as sourcing cargo and transport, planning routes and driver schedules, overseeing and coordinating vehicle movements, handling customer orders, monitoring the cargo transportation process, communicating with clients, and managing documentation associated with cargo transportation. Such comprehensive range of tasks requires numerous skills, so for this study only ten skills in each category, that appeared most frequently in the advertisements, were taken into account.

The first category, personal competences, included such qualities as diligence, responsibility, self-control, self-confidence, goal and result orientation, persistence, commitment, initiative, creativity, responsibility. Figure one presents the comparison of the mentions of the required personal competences in vacancy announcements and the ones indicated by the survey respondents.

The only competence (Fig. 1) that equally meets both the requirements set by employers and the requirements set for candidates in job vacancies is a good memory, other competencies were evaluated differently. Initiative was mentioned by the employers twice as often as it was in the ads for the position, with creativity producing a very similar result. The most sought personal competence by employers was goal and result orientation, while the advertisements named this competence by a third less frequently. Responsibility was the most often mentioned personal competence in the vacancy ads for the position of a transport manager with the employer requirement following close.

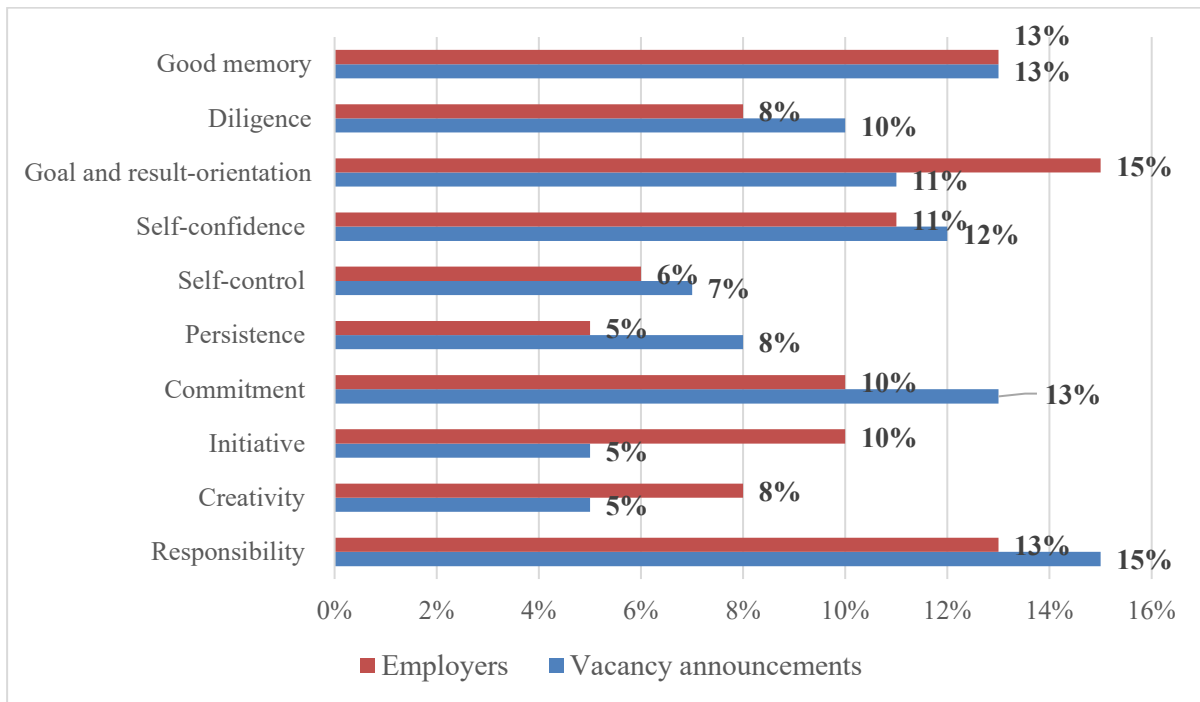


Figure 1 Personal Competences (prepared by the authors)

The analysis of social competence list (Figure 2) produced a rather similar set of results.

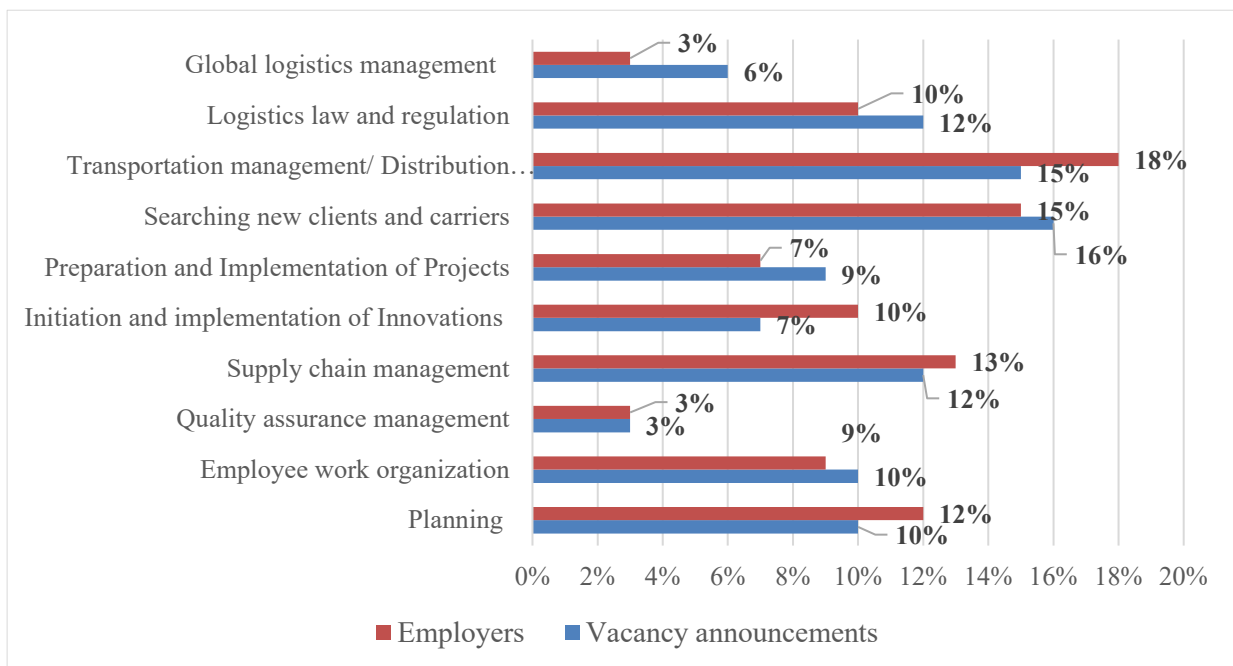


Figure 2 Social Competences (prepared by the authors)



One fifth of the employers named knowledge of a foreign language as an important competence (Fig.2) for a transport manager, the same result was found in the vacancy advertisements. Both samples indicated English as the most useful language for the activity, the least required languages were Italian and French, knowledge of Russian came the second, and German – the third. The least mentioned skills in both sets of samples were negotiation and relationship building capabilities. All the competences, except knowledge of foreign language, were mentioned in between five to fifteen percent of the samples.

Finally, Figure 3 presents the category of special skills. As it is shown in the figure, transportation management and searching new clients and carriers received the highest number of mentions by both employers and vacancy announcements. The least sought competences in both samples appeared to be quality assurance management and global logistics management. The difference in the number of mentions of the competences between the samples varied from one to three percent.



*Figure 3 Special Competences (prepared by the authors)*

Transportation management was comprised of such skills as route planning, documentary verification and coordination of vehicles received more mentions in vacancy announcements, while fuel control was requested more by employers.

In summary, the results of this study reflect the attitude of a large part of Transport Logistics professionals regarding which competences are particularly important and valuable for employees working in the field of transport logistics. Research insights can be relevant in decision-making regarding the suitability of

candidates for a position and facilitate the employee selection procedure, at the same time, research insights are useful in assessing what kind of employee competency development training the company could organize in order to achieve possible benefits in the long-term perspective.

### **Conclusions**

This study established that the mismatch between the competences required by the employers of graduates of Vilnius College of Technologies and Design and the competences requested for the transportation manager's position in vacancy announcements is minor. When analysing personal competencies, the opinions of job vacancies and employers coincided only with good memory. An insignificant difference between requirements in vacancies and those of employers is self-confidence and responsibility. Employers value goal and result-orientation, initiative and creativity, while these skills are significantly less required in job vacancies. Vacancy announcements emphasize commitment and persistence as personal competencies as more valuable skills required from the workforce. In general, social competencies, such as delegation, organizational skills, ability to expeditiously solve problems, appeared to be valued by employers more than they are reflected in job advertisements. However, such social skills as collaboration, management and leadership skills were emphasized in the job advertisements more often than by the employers. The results of special competences' analysis revealed numerous discrepancies between requirements in the vacancy announcements and those named by the employers.

The current study corroborates previous research that businesses and employers have to cooperate with academia and keep searching for common ground while developing or upgrading study programs as constant review and update of the educational materials is the only way to equip graduates with skillset needed by the labour market.

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# PROMOTIONAL OPPORTUNITIES FOR ENHANCING SALES IN COSMETICS PRODUCTION SECTOR THROUGH SOCIAL MEDIA PLATFORMS

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**Abstract.** *The paper deals with the promotional opportunities enhancing sales in the cosmetics production sector through social media platforms (SMPs). This topic holds significant relevance in the contemporary business landscape. Firstly, in the digital age, consumer behavior is evolving rapidly, with SMPs becoming integral in shaping purchasing decisions. Understanding the dynamics of consumer engagement and preferences on these platforms is crucial for cosmetics producers seeking to optimize their promotional strategies. Moreover, as the cosmetics industry increasingly transcends geographical boundaries, social media provides a global platform for reaching diverse audiences. Understanding how to tailor promotional efforts to different demographics and cultures is vital for international market expansion, and this study addresses these considerations.*

**The aim of the research** is to analyse the promotional opportunities for enhancing sales in the cosmetics production sector through social media platforms.

**Methods:** analysis of scientific literature, questionnaire survey, analysis of information sources, data summarisation, graphical representation.

**The results** obtained through the questionnaire survey indicate a relatively low level of popularity in the analyzed cosmetics production sector. Consequently, respondents encountered challenges in providing comprehensive responses due to this limited awareness. The survey further highlights that the company primarily employs a modest set of fundamental sales promotion methods on social networks.

**Keywords:** cosmetics production, enhancing sales, sales promotion (SP), social media platforms (SMPs).

## Introduction

**Relevance of the topic.** Businesses have consistently aimed to distinguish themselves from rivals. Yet, in today's environment of growing consumer purchasing influence, it is imperative for companies not merely to engage in occasional sales but to cultivate robust customer relationships for enduring success. Achieving this requires increasing supply, developing strategies to attract new customers while retaining existing ones, and finding ways to increase consumption.

Traditionally, people are used to using simple sales promotion tools. However, with the development of new technologies, this process has become more complex. In order to successfully sell a product, it is necessary to have a sincere interest in it and a good understanding of it. Effective sales promotion tools can greatly influence customer behavior and influence their decision to choose a particular company's products or services. However, every company and its customers are unique, so it is very important to remember that success depends on choosing the right promotion tools. Conducted analysis (Boyd and Ellison, 2007; Duffett et al., 2020; Binsawad, 2020; Bilushchak et al., 2020; Zarella, 2009; Negi and Ketema, 2010; Nasru and Yasri, 2018; Nisar and Whitehead, 2016; Isoraite, 2020; Streimikiene et al., 2021; Zhang et al., 2020; Onete et al., 2020) shows that although there is a lot of research of this topic, sales promotion on social media platforms is a relatively new phenomenon and it has been going on for a little more than a decade, so it remains a very relevant issue for trade companies.

Therefore, the research problem is posed by a question: What are the opportunities for enhancing sales in the cosmetic production sector on social media platforms?

The research object is enhancing in the cosmetics production sector on social media platforms.

The aim of the research is to analyse the promotional opportunities for enhancing sales in the cosmetics production sector on social media platforms.

The research objectives:

1. To analyze promotional opportunities for enhancing sales through social media platforms from a theoretical perspective.
2. To conduct a survey on promotional opportunities for enhancing sales in the cosmetics production sector through social media platforms.

The research methods: analysis of scientific literature sources, questionnaire survey, data summarization, graphic representation.

As the cosmetics industry increasingly transcends geographical boundaries, social media provides a global platform for reaching diverse audiences. Understanding how to tailor promotional efforts to different demographics and cultures is vital for international market expansion, and this study addresses these considerations.

## **Promotional Opportunities for Enhancing Sales through Social Media Platforms from a Theoretical Perspective**

**Sales promotion conception.** Sales promotion (SP) stands out as a key marketing strategy aimed at enhancing company's sales through the promotion of its products or services using various tactics. This approach becomes particularly valuable when introducing new offerings, liquidating existing product

inventories, and attracting a broader base of potential customers. The primary objective of SP is to achieve short-term sales goals by forcing customers to make purchases (Shamout, 2016).

In recent times, there has been a heightened focus on SP of diverse products. Various persuasive and informative tools are deployed to expedite and fortify consumer responses. As Kumar, Suganya, and Imayavendan (2018) pointed out, SP is a facet of marketing activities that enhances sales. Additionally, it exerts a short-term influence, compelling consumers to select one among competing brands, reinforcing their desire to make a purchase, and consequently, boosting overall sales (Jean, Yazdanifard, 2015).

In summarizing the concept of SP, it can be asserted that when analyzed from different perspectives, the fundamental approaches to SP underscore its role as a key tool for attracting consumers, boosting sales, stimulating unplanned purchases, adding value to sales, fostering competitiveness, and influencing consumer behavior. SP can be characterized as a marketing tactic with the objective of heightening demand for a product or service through the provision of incentives to customers. These incentives encompass a range of activities such as discounts, coupons, rebates, free samples, contests, giveaways, loyalty programs, in-store displays, and product demonstrations.

**Diversity of social media platforms and their benefits for business and consumers.** Social media platforms (SMPs) have become a common form of social communication. In addition, SMPs facilitate communication with various user groups. The most used SMPs are *Facebook* (2.93 billion monthly active users), *Instagram* (over 1.28 billion monthly active users) and *LinkedIn* (over 740 million members). In order to connect with existing or potential users, companies often create their own social media pages or accounts. However, SMPs also present challenges related to access to private information and privacy. Therefore, researchers and companies are paying more and more attention to them in order to use SMPs to sell products and services (Boyd, & Ellison, 2008).

According to Davis, Wolff, Forret and Sullivan (2020), SMPs contribute to the improvement of companies by offering new insights about the brand and by offering innovative ways of implementing marketing (Zarella, 2009). More and more businesses are exploiting the niche of SMPs, so it is important to pay attention to what methods of SP prevail in them. Analyzing the scientific literature (Seturi, 2022; Graham et al., 2019; Dehkordi et al., 2012; Karthikeyan, & Panchanatham, 2019; Ramesh et al., 2016; etc.), it is observed that SP measures are often taken to achieve one of two goals: short-term or long-term sales that apply to both traditional and online SP. Short-term SP usually aims to sell off inventory, increase sales of a specific product, or introduce customers to a new product. On the other hand, long-term SP differs from short-term ones in that they do not aim for quick results.

SMPs can be a useful tool for businesses to increase sales and attract new customers. According to Negi and Ketema (2010), one of the main benefits of SMPs for business is the ability to build personal relationships with customers and potential customers. Products or services can be presented through photos, videos or even live streaming. This allows companies to create more visibility and attract new customers (Barkley et al., 2007). As consumers have become more pampered, the quality of service has also improved significantly. Table 1 summarizes the benefits for businesses and consumers.

*Table 1 Benefit of Enhancing Sales for Businesses and Customers (made by the authors)*

<b>BENEFITS OF ENHANCING SALES FOR BUSINESSES AND CUSTOMERS</b>		
<b>FACTOR</b>	<b>BENEFITS FOR BUSINESS</b>	<b>BENEFITS FOR CUSTOMER</b>
<b>ACCESS AND CHOICE</b>	Geography is no barriers to social businesses. It enables small companies to join the global network and do business on a global scale.	Consumer can choose from a wide range, regardless of where they are in the world, they can choose the product that best suits their needs.
<b>COMPETITIVENESS, SERVICE QUALITY</b>	When dealing with customers, businesses can compete more successfully because companies can offer higher quality products and services, as well as provide faster and more complete information.	High competition leads to better customer service and faster solutions to their problems.
<b>COMMODITY NECESSITY</b>	Electronic data collection allows salespeople to quickly and easily learn customer preferences and offer the best possible product.	The consumer will choose the product with the best price-quality ratio and which best meets his needs.
<b>OPPORTUNITIES, ORIGINAL GOODS</b>	A great opportunity to enter the market for brand new products and services.	Customers can choose from a larger range at better prices.
<b>COSTS</b>	Electronic communication reduces human resource costs.	Reduced prices for goods and services offered to consumers.

**A theoretical model for SP on SMPs.** The analysis of scientific literature allows to present a generalizing theoretical model for SP on SMPs (see Figure 1).



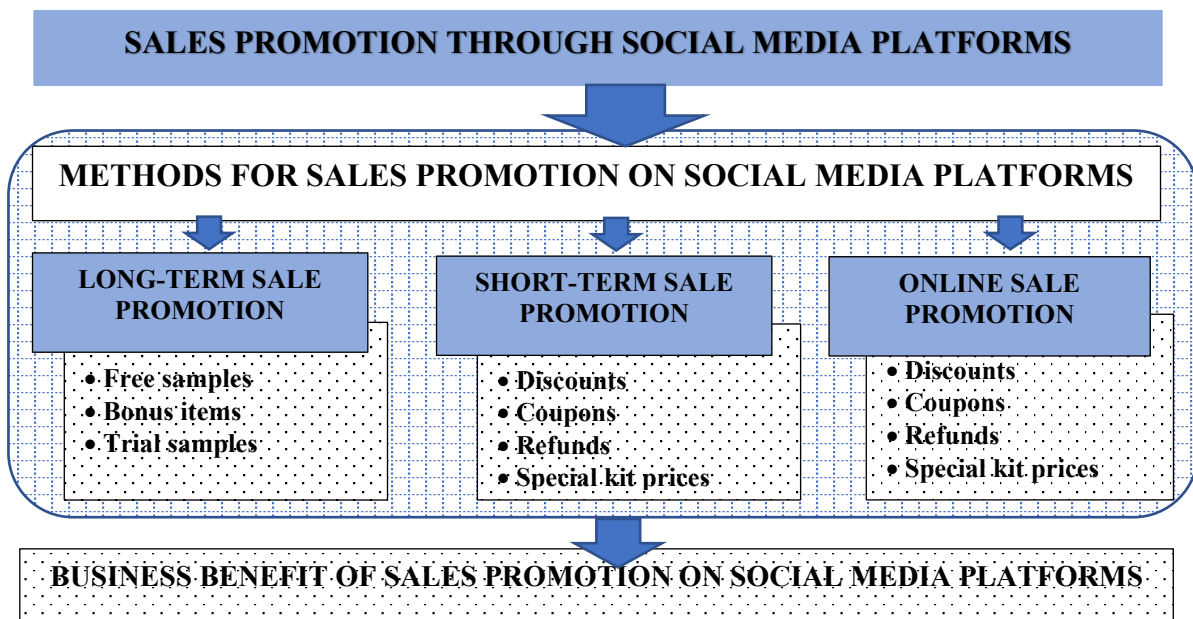


Figure 1 Model for Sales Promotion on Social Media Platforms (made by the authors)

Generalising the benefit of SP for businesses and customers, it can be claimed that SMPs serve as a potent and limitless instrument for businesses to enhance sales and attract in new customers. Consequently, enterprises are progressively opting for SMPs not solely as platforms for advertising, but also as avenues for communication, user community engagement, and product or service presentation. Furthermore, SMPs contribute to enhancing a company's image, rendering it more appealing, contemporary, and innovative. This facilitates the brand's ability to garner favor from a broader customer base, reaching a larger audience at a comparatively economical cost.

SMPs are an inexhaustible tool that helps companies increase sales and attract new customers as well as improve the company's image, make it more attractive, modern and innovative. This makes it easier for brands to gain more customer favor and less expensive to reach a wider audience.

### Research Methodology

The research was conducted from in March-April, 2023 with the aim to analyse the promotional opportunities for enhancing sales in the cosmetics production sector on social media platforms.

**The research method** is quantitative research. This research method was chosen because of its large-scale, systematic, well-considered data collection, using representative sample groups and expressing the results numerically. Data is collected through an online survey.

**Research process:** in order to investigate the possibilities of SP of cosmetic products, the research process consists of 5 stages (see Figure 2).

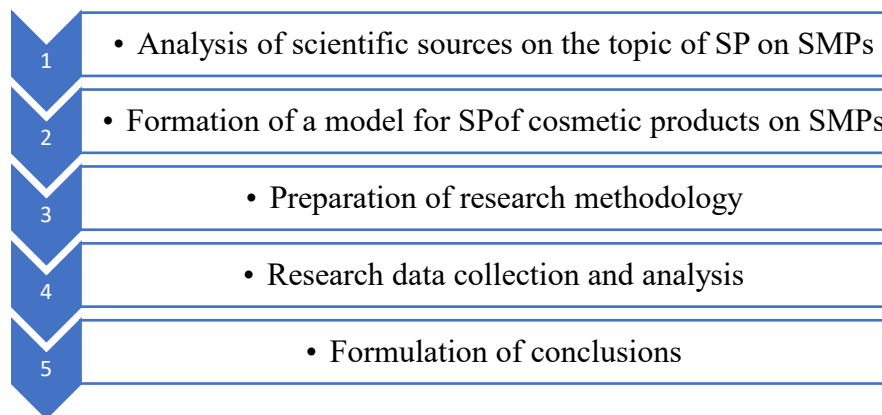


Figure 2 *Stages of the Research* (made by the authors)

**Research instrument:** the empirical study is based on the results of the analysis of the scientific literature on SP on SMPs. In order to analyze the possibilities of SP in the sales stream of cosmetics production, the research instrument - a questionnaire survey - was created. The questionnaire consists of 17 closed type questions.

**Research instrument criteria** consist of the concept and goals of SP, methods of SP on SMPs, advantages and disadvantages of SP on SMPs, benefits of SP on SMPs for business and consumers, consumer opinion about the cosmetic production of the investigated company and demographic data of respondents.

**Study sample and sampling method:** the study sample was calculated according to the Paniotto formula. In order to conduct a study on the possibilities of SP on SMPs, it is necessary to conduct an interview with at least 380 respondents.

**Research ethics:** ethical principles were observed during the research - anonymity, data security, confidentiality.

**Limitations of the study:** in order to ensure the reliability of the research results, there are limitations that are related to the data. The data used for the research was obtained from respondents during an online survey. In the questionnaire, it was possible to choose several or all of the offered options for the question asked, but the respondents usually chose only one or two, in their opinions.

The study is conducted on the example of a company that sells eyebrow and eyelash serums, plumping lip glosses, face serums and makeup bases, hair strengthening products online.

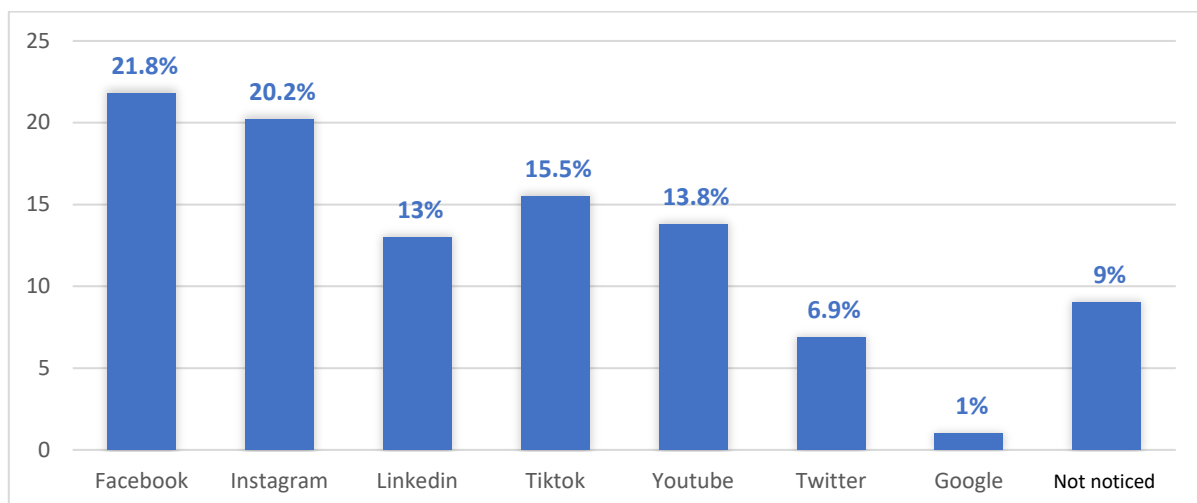
### **Analysis of the Research Results**

The first aim of the research was to find out the opinion of the respondents whether SP influences their decision to buy and to find out what methods of SP are noticeable on SMPs. The research revealed that only 26.1 percent of the respondents said that SP has only a short-term effect, which is created to encourage the choice of one of several competitive brands. The majority of 59.7 percent answered that they did not know about the production, before buying goods or services, they think many times whether they really need the goods or services.

What influences on their decision to buy, as the results of the study show, 34.7 percent respondents answered that discounts, 26.3 percent noticed coupons, 22.9 percent noticed samples and 15.5 percent noticed a refund for goods. It was also aimed to find out what long-term methods of SP you notice on SMPs. Research data show that 27.5 percent noticed free samples, 26.9 percent noticed bonus goods, 23.1 percent answered that they notice trial size samples and 22.2 percent replied that partially free samples.

The fourth research criterion "Benefits of SP on SMPs for business and consumers" aimed to find out what benefits SP on SMPs provide for business and consumers. According to the research data, 27.8 percent claimed that they attract new customers, 26.7 percent believed that it increased sales, 18.2 percent claimed to build personal relationships with customers. The research analysis also showed that 32.5 percent of respondents believed that they could choose goods with the best price-quality ratio. 24.7 percent believed that due to the high competition of companies, they could get better service. 24.4 percent said that it seemed useful for them to be able to choose from a wide range offered and 18.4 percent believed that SMPs offered reduced prices for goods.

One of the aims was to find out in which SMPs the respondents noticed the investigated cosmetic products under the study (see Figure 3).



*Figure 3 Observability of Respondents for Cosmetics on SMPs (made by the authors)*

The research findings indicate that 21.9 percent of respondents noticed cosmetics promotion on Facebook, 19.9 percent on Instagram, 12.8 percent on LinkedIn, 15.6 percent on TikTok, and 13.9 percent on YouTube. 9 percent had no awareness, with one respondent recalling a Google search ad.

Regarding SP methods, 35.1 percent noticed online SP methods (newsletters, loyalty plans, gifts, market segmentation), 33.1 percent observed short-term strategies (discounts, coupons, samples, refunds), and 31.5 percent noted long-term approaches with partial or free product samples, bonus items, and trial sizes.

In summarizing consumer opinions on cosmetic products, respondents partially noticed sales through various SP methods. The company is relatively unknown (32 percent of awareness), with respondents perceiving limited engagement on SMPs.

*The study suggests exploring SP opportunities on SMPs like Facebook, Instagram and LinkedIn, but also on TikTok, YouTube and Twitter to increase brand awareness. Enhancing visibility can involve encouraging user interactions, sharing customer opinions, and using relevant hashtags to facilitate discovery.*

*In response to the scientific inquiry addressing the research problem - what are the opportunities for enhancing sales in the cosmetic production sector on SMPs - it is advisable for companies engaged in online sales of cosmetic products to strategically leverage SMPs. This recommendation is substantiated by the application of a theoretical model for SP on SMPs, as illustrated in Figure 1. It is noteworthy that the elements encompassed within the model exert varying degrees of influence on SP within the cosmetic production SMPs.*

## **Conclusions**

1. Sales promotion is a crucial element of marketing employed by companies to enhance product sales. This strategy encompasses diverse methods like discounts, coupons, and loyalty programs, with the aim of capturing the consumer's sudden interest in the product. In the contemporary landscape, leveraging social media platforms for sales promotion proves effective in enhancing both sales and customer engagement. Sales promotion falls into three categories: short-term, long-term, and online methods. These methods, when strategically chosen, facilitate the establishment of relationships with existing and potential customers. Consequently, businesses increasingly turn to social media not only for communication but also for user attraction, improving their overall image. The direct access to customer expectations afforded by social media platforms aids in the creation of products or services that resonate more effectively with the target audience.

2. A study on the sales promotion of cosmetic products on social media platforms revealed that respondents are familiar with the concept but mostly associate it with selecting advertising tools to boost company sales. Respondents

consider the need for a product or service before making a purchase influenced by sales promotion. Notably, they identified discounts and coupons for short-term promotion, free samples and bonus items for long-term promotion, and newsletters, loyalty incentives, and gifts for online promotion. Respondents value the chance to choose products with the best price-quality ratio and acknowledge the benefits for businesses in attracting new customers and increasing sales. Despite the cosmetics brand's limited recognition, those familiar with it partially noticed its sales promotion methods.

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# TESTING AND STRATEGIES OF THE ANATOMAGE TABLE USE IN TEACHING PHYSICAL ANTHROPOLOGY

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**Abstract.** *At the Department of Morphology, integrating the Anatomage Table (AT) into medical education is a supplementary resource to teach virtual Human Anatomy to medical students and their future professional and clinical careers. This study aimed to examine and test an AT in teaching a virtual Physical Anthropology course and assess the tutors' beliefs and perceptions regarding using technology for teaching. Two tutors participated in the study from autumn 2022 until autumn 2023. Data were collected by tutors who followed specific methods to identify and measure anthropometrical points for evaluation. Tutors paid attention to the available virtual human body images for data collection, research, teaching and learning. Several anthropometrical measurements were performed and collected based on standard methods and positions in the table views. AT was mandatory to verify precise indicators' location and confirm digital instruments for their detection over several human bodies. As part of this study, suggestions for the utilization of the AT to gather essential anthropometrical information have been prepared. Future studies can aim to generate unique methods and supplemental procedures for getting anthropometrical data in contact with AT and using this technology in teaching Physical Anthropology.*

**Keywords:** *Anatomage Table, anthropometry, Physical Anthropology, teaching, tutors.*

## Introduction

Today, tutors are under pressure to start and deliver high-quality Human Anatomy and Physical Anthropology study courses teaching, including new educational technologies (Scheffel & Wirth, 2022) and resources for undergraduates and postgraduates in medical education. Some adapt existing methods and sources, while others create new possibilities and courses (Guimarães & Ferreira, 2020). Tutors should build the fundamental competencies needed for students' practical experience in further medical and/or clinical studies by providing students with unique teaching and learning opportunities in practical classes of the Physical Anthropology course. The Anatomage Table has a significant role in the academic purposes of the human body (Brown et al., 2015). Related to this, three-dimensional (3D) pictures are designed to meet the need of teaching, details obtaining, gathering and surveying (Bartoletti-Stella et al., 2021).

Digital anthropology should become necessary in developing and creating methods and standards for data collection from virtual bodies (Heymsfield & Stevens, 2017).

Since the additional and helpful performance of the Anatomage Table during the course Human Anatomy from 2015 until 2023, the number of tutors and students using this platform in the Department of Morphology has been rapidly growing. As a result, the tutors decided to use the Anatomage Table in other study course or Physical Anthropology. Our academic staff previously believed that the competent teaching and learning of the external composition of the human body could be maximized with the assistance of this technology. In the literature, there is a minimal amount of studies related directly to using the Anatomage Table in teaching virtual Physical Anthropology course and anthropometry (Gaya-Sancho et al., 2023). This study aimed to examine and test an Anatomage Table in teaching the virtual study course Physical Anthropology and to assess the beliefs and perceptions of the tutors regarding using the technology for its teaching.

## **Materials and Methods**

### *Case study*

In 2015, Rīga Stradiņš University's Department of Morphology integrated the Anatomage Table (version 6.0.3.) as an additional tool for learning and teaching Human Anatomy. The Anatomage Table, developed by Anatomage Inc. in San Jose, CA, USA, features four digitalized whole human bodies, including an Asian woman and man, and a Caucasian woman and man. These bodies were reconstructed from frozen cadavers via the U.S. and Korean National Library of Medicine's Visible Human Projects. Each body was separated into narrow slices ranging from 0.60 to 1.00 mm, then reproduced at maximum determination and virtually regenerated. This allowed the examination of different internal structures from multiple angles, providing an effective learning tool for students and teachers (Allen, Kirkpatrick, & Agosto, 2019). The first experience of testing the usage of the Anatomage Table in teaching the study course Physical Anthropology was researched as a case study. Therefore, this investigation included two questions:

- 1) How did the tutors manage using the Anatomage Table for digital detection of a few external human body measurements?
- 2) What are the Anatomage Table technology advantages, disadvantages and satisfaction detected by the tutors to begin teaching the study course Physical Anthropology?

### *Sample, setting, reliability and data gathering*

This study's sample consisted of two tutors of the Department of Morphology who were involved in using the Anatomage Table to teach the study courses Human Anatomy and Physical Anthropology from autumn 2022 until



autumn 2023. A specific protocol was devised to enable quick and efficient data collection on anthropometric points, distances, measurements and evaluations. Its design aimed to gather the necessary information, which was required to answer all the search issues and had assisted in receiving this study's findings.

#### *Detection of anthropometrical points and distances*

The procedure was performed over two days: the first period lasted about two hours, and the second round took place the following day. Primarily, every virtual human body was sliced until the skeletal system. Measurements took place without contact with the natural objects, and it was challenging to identify selected anatomical landmarks on flat scans and sensitive touch screens. According to this, all human virtual bodies were adopted to specific poses. By positioning the human body in a constant, fixed and regular metric position on the Anatomage Table's touch screen, the investigator could detect the locations of the anthropometric indicators and distances. This enabled the precise positioning of digital instruments over each virtual figure, making studying and analyzing the details easier. Anthropometric measurements were taken using the digital distance measurement tool from the Anatomage Table Application Toolbar. Each virtual body was measured using the standard methods proposed by Norton (2018). In the bony frame, three simply noticeable, definitive two-sided indicators were chosen:

- 1) acromiale (an anatomical landmark at the superior and external border of the acromion process);
- 2) iliospinale anterius (refers to the most prominent point that protrudes downwards and forwards on the iliac crest);
- 3) iliocristale (the most lateral point on the superior outer edge of the iliac crest).

The locations of certain points were identified in two different planes – frontal (coronal) and sagittal. Then, three landmarks (acromial, iliospinale and iliocristale) were fixed on both sides of the body, and their positions were also determined in previously announced planes. The distances between bilateral indicators (bi-acromial, bi-iliospinal, and bi-iliocristal widths) were measured and recorded using a distance measurement tool. One investigator repeated measurements several times to reduce human errors. The accuracy of these details was verified by one of both tutors, who was also an experienced anthropometrist.

#### *Data analysis and validity*

Two different approaches were used to investigate the data collected through the protocol. Firstly, the study was based on experimental access to a specific case the authors examined. Secondly, the protocol used in the survey mainly contained open-ended questions, and the ranking was qualitative (Abuhamda, Ismail, & Bsharat, 2021). To evaluate the overall feedback given by the tutors during this

study, their responses were recoded and subjected to qualitative analysis using thematic content analysis (Elo & Kyngäs, 2008). To maintain the quality and validity of this study, the tutors’ responses were preserved in their original form and not altered in any way.

## **Results**

The using an Anatomage Table in the Department of Morphology differs because of the various characteristics and demands of the courses. This study’s findings were fractioned into four categories placed on the type of questions. The protocols’ questions allowed the tutors’ experience to be analyzed. Thus, it was attractive for the tutors who participated in the educational process to find their first experience using the Anatomage Table to detect a few external human body measurements digitally. An analysis of the fixed answers in protocols revealed that the tutors underlined various points. The main of them were included using the Anatomage Table to detect anthropometrical points, advantages, disadvantages and satisfaction of employing the Anatomage Table in teaching the course Physical Anthropology. The main detected categories and subcategories are presented in Table 1.

*Table 1 Tutors’ main points of using Anatomage Table in teaching Physical Anthropology (made by authors)*

Category	Subcategory
The using of the Anatomage Table in the detection of anthropometrical points	Anatomical landmarks and anthropometrical points difficult identification on flat scans and sensitive touchscreen
	Fixation, customizing of virtual bodies in constant positions
	Specific poses for possible measurements
	Long-time detection and repeating of precious anthropometrical points’ distances
Advantages of using Anatomage Table in teaching Physical Anthropology	The access to different virtual human bodies
	Enhanced, realistic, high-quality visualization on the screen
	Storage of the 3D images in different formats
	Information about different diseases and variations
	Direct examination and investigation in real-time and place
	Safe, more hygienic and friendly environment for the users
	No need to use a special set of anthropometrical instruments
	Better and more precise labeled or magnified structures
	Repeating steps till ideal user skills
	Moving, examination in various anatomical planes and layers
	Users digital and technical skills development and improving
	Easy to customize, design the navigation and structures in the Anatomage Table menu

Disadvantages of using Anatomage Table in teaching Physical Anthropology	Lack of instructions/guidelines on detecting and measuring human bodies on touch screens
	Anthropometrical points' migration and landmarks deformities
	Time-consuming and monotonous activities
	No opportunity to feel the texture of the different tissues
	Not understandable standard examination methods of the human body without special instruments
	Different technical issues
Satisfaction of using Anatomage Table in teaching Physical Anthropology	Link to the not-well-handled problems
	Traditional teaching support by virtual technology
	A late decision to use the Anatomage Table in teaching
	Not debated and explained advantages and disadvantages
	Human anthropology specialists and technologists necessary support

### *The using of the Anatomage Table in the detection of anthropometrical points*

Conversely, both tutors affirmed that identifying selected anatomical landmarks and anthropometrical elements on flat scans and sensitive touchscreen was rugged. Several comments reflected these tutors' difficulties and discomfort about using the Anatomage Table to detect anthropometrical points.

From the tutors' experience, they mentioned that virtual bodies were more flexible to fix and customize them in constant positions. Comparative measurements were taken only after adapting human virtual bodies to specific poses in the sagittal and frontal planes.

Some tutors' comments related to the prolonged and repetitive time to detect precious distances between anthropometrical points.

### *Advantages of using Anatomage Table in teaching Physical Anthropology*

One of the finding points is how study courses are undertaken in higher education, relates to the indications and directions that new technology can bring compared to traditional things. In the Department of Morphology study, it seemed essential to detect which benefits the tutors established for the following users, including students, and about the Anatomage Table in teaching the course Physical Anthropology in comparison with classical possibilities and methods of this course.

About this idea, tutors suggested that the Anatomage Table contains the opportunity to use different virtual human constitutions together with enhanced, realistic, high-quality visualization of them on the screen. Moreover, the tutors found that the 3D figures can be stored in different formats. Besides, these 3D images provide information about topics that real humans may be unwilling to discuss during anthropometrical investigation, including their diseases and variations.

Most of the tutors' statements were about using the system. The tutors have raised a second benefit regarding the protocol. The Anatomage Table allows

direct examination of virtual human bodies and investigation activities in real-time and place. The environment is safer, more hygienic and friendly to the users.

Another positive feedback from tutors was that there is no need to use a unique set of anthropometrical instruments. Labeling or magnifying details can enhance their visibility and enable more accurate detection than traditional anthropometry. They felt this new system allows them to repeat steps until the users ideally obtain the skills. Additionally, virtual human bodies can be moved and examined in various anatomical planes, quickly reaching different layers.

Generally, the tutors who had mentioned design characteristics discussed the benefits of developing the users' digital skills and improving their technical skills. Finally, both lecturers emphasized how easy it is to adopt and represent course directing and details using the Anatomage Table menu. All of these points must be considered because it is vital to acknowledge the active role of users of the Anatomage Table in teaching the Physical Anthropology course.

#### *Disadvantages of using Anatomage Table in teaching Physical Anthropology*

Despite the advantages of the Anatomage Table for the study tutors, users identified several disadvantages, particularly when compared to traditional anthropometry. Our tutors pointed out that the main idea was related to the need for more instructions or guidelines on detecting and measuring human bodies on touch screens.

One of the most concerning points is the migration of anthropometrical points from one to the other and the deformities of the landmarks. It is more challenging to incorporate this into the course materials. Regarding this point of view, both tutors mentioned that the general disadvantage was that it was time-consuming, and the users may feel monotonous.

There was no opportunity to feel the texture of the different tissues of human bodies. The tutors also stated that detecting the anthropometrical points and distances without special instruments could not offer a complete understanding of standard examination methods of the human body in teaching the Physical Anthropology study course.

Different technical issues can also make the content and design of this study course more complicated and challenging.

#### *Satisfaction of using Anatomage Table in teaching Physical Anthropology*

Tutors are satisfied with the testing of the Anatomage Table, related to the detection of the anthropometrical points and their measurements. On the other hand, the tutors considered the virtual platform linked to the problems that are not well handled in the transfer of Physical Anthropology study course from the traditional need to be better digital. Consequently, the Physical Anthropology course has to be remodeled from conventional to new with a combination of digital possibilities.

Additionally, the tutors commented that this virtual technology supports their traditional teaching of the Physical Anthropology study course. They mentioned that adopting this platform in teaching and learning other study courses also could be an excellent reinforcement.

Finally, the third point that bothered these tutors is that the decision to use the Anatomage Table in teaching Physical Anthropology was developed only eight years after the Anatomage Table implementation in the Human Anatomy study course in the Department of Morphology. Regarding this, tutors responded with the advantages and disadvantages of this technology that have never been adequately debated and explained before. This point highlighted the need for good support from the human anthropology specialists and technologists throughout the complete use of the Anatomy Table in the teaching process of the Physical Anthropology study course because it could be beneficial to understand more about this technology for its full implementation.

### **Discussion**

Several authors (Alasmari, 2021; Periya & Moro, 2019) state that the Anatomage Table is a powerful innovation and machine. This equipment can intensify and support medical education and sciences in specific scenarios, types and directions. In a Human Anatomy study course, it is helpful to teach, learn, demonstrate, compare and illustrate virtual dissections, to review clinical cases and simulate several procedures, functions and possibilities, depending on the available versions, settings, users' experience, skills and necessity (Smith, Ruholl, & Gopalan, 2019). This technology provides digital, 3D full-size images of human bodies created from scanned views of human cadavers (fresh and frozen). It offers the best possible visualization of the human body and its composition (Raja, Chandra, Azam, Das, & Agarwal, 2022). The Anatomage Table enables immediate management of 3D volumetric pictures fabricated from computer tomography (CT) scans and radiographs, including topographical information together with surface rendering (Chaudhry et al., 2023; Patra, Asghar, Chaudhary, & Ravi, 2022).

At the same time, other aims exist, including obtaining experience with the Anatomage Table equipment and the tools and images it offers, as well as testing hypotheses (Said Ahmed, 2023). Nowadays, digital possibilities should also be implemented in forensic and physical anthropology, also known as biological anthropology (Williams, 2017). It is a discipline that dictates high practical skills and content. By investigating and understanding the various changes and factors over time, we can better realize humanity's past, present and future growth. Teaching students about physical anthropology is crucial in developing a deep appreciation for the human variety and giving them a higher position to be interested in further anthropological studies (Ubelaker, 2018). In this discipline,

visualization is one of the most essential tools for teaching and learning anthropometrical measurements and osteometric structures (Mocini et al., 2023). However, a fast and fascinating modification is happening that proceeds anthropology to the present age with the initiation of computational anthropology. This transition is more severe and accelerated, and this area has yet to adopt recently developed ideas and theories stimulated by the technological uprising (Bubb, 2004). By offering new hands-on experiences with modern technologies, resources and equipment, students should be able to study how to use physical anthropology's basic techniques and digital options in the natural human body and practice, such as determining gender, ethnicity and age differences.

Demonstration and studying with the virtual dissection equipment in the Department of Morphology require special attention as they are new experiences. Each case of manipulation with the Anatomage Table is different because every faculty, tutor and student has other aims, aspects and needs in practical classes. Using technologies in higher education requires a lengthy planning process involving numerous, varied people and materials (Anjankar, Chavan, Wankhede, & Hajare, 2023). Success in developing technology may be difficult, including establishing the flow of details and knowledge between the large number of experts and professional categories with their divergent aspects and comprehension bases in a need to produce current methods in the pedagogy (Sayidova & Mirzayeva, 2020). The Anatomage Table use and implementation process includes separate steps to turn on the procedures followed.

Physical Anthropology relates to a convenient study course with difficulty rooted in research experience, and the discipline has a significant theoretical aspect. Competent teaching of the theoretical background of this study course should generate professionals who are inside of their field of mastery and who are aware of their restrictions. The traditional teaching methods of introductory medical study courses can be modernized and transformed into innovative digital training strategies for students in medical education (Santos, Barreira, & Saad, 2022; Yang, 2023). The research conducted by Almizani et al. (2022) underlined that teaching medical students requires continuous effort, and numerous measures should be taken to uphold and enhance a positive outlook toward fundamental knowledge. Physical Anthropology teaching should focus more than just anatomy and "standard" techniques (Jerković et al., 2022). It also requires instilling logical analysis, the ambition for skills collection and the means to investigate approved preparation (Fyfe, Fyfe, Dye, & Radley-Crabb, 2018). Owolabi et al. (2022) state a need to promote educational innovations, including the Anatomage Table.

Access to real human skeletons is essential for the constructive guidance of the Physical Anthropology study course. Facilitating and improving tutors' teaching and students' learning experiences through interactive digital tools such as the Anatomage Table is possible (Kavvadia, Katsoula, Angelis, & Filippou,

2023; Mani, Armstead, Boyd, Ghulmi, & Nunez, 2023; Kopcak et al., 2021). Anthropometry includes a set of complete measuring methods to demonstrate the proportions of the human figure and shape that comprise the measurements of the framework, its parts and skull (Kuriyan, 2018). Precision is vitally crucial as it requires a lot of practice (Ozsoy, Demirel, Yildirim, Tosun, & Sarikcioglu, 2009). Data collection is essential to the success of each scientific study. To explain the body's physical characteristics, unique assessment or their fusions must be considered, accompanied by baseline values by stage of life and gender. Measurements should be done by trained personnel and unique standard protocols (Preedy, 2012).

As the significant criterion between qualitative statistics, direct observation has been described in gathering methodologies (Morgan, Pullon, Macdonald, McKinley, & Gray, 2017). This study was focused mainly on the first experience of using this technology from the tutors' perspective in teaching the Physical Anthropology study course. Tutors have professional and educational levels in human morphology, including anatomy, physical anthropology and anthropometry. It is important for tutors to have technical knowledge to effectively communicate and work with students who require appropriate testing of devices. The Anatomage Table provides an opportunity for teachers to inspire and encourage students in innovative directions. Our tutors should also be able to provide links that may be useful for students.

Although technical equipment can be a fabulous attachment to practical classes, this item can also be a cause of dissatisfaction for tutors and students. Besides, the validity of the accessible software, devices and digital mechanisms must be checked to provide their preciseness, as basic measurements have demonstrated. Regular validation of the digital machines could promote the production of recent human identification techniques with repeated practice. Unless the tutors are controllable in technology and/or can endorse the computer's mechanical system in connection with practical classes, technology experts will be required to fix difficulties.

In teaching Physical Anthropology, practical classes should be used at every stage of the study process. Regular training gives the tutors and students experience evaluating the body composition and anthropometrical points and interpreting the observations. Their expressions, differences and fluctuations of a human figure from the regular physical composition and proportions may be determined. In the natural practice of Physical Anthropology study course, anthropometric equipment, grading tape and special alternative facilities are attached to precisely measure the fundamental details of the human body (Sevillano Oriola, Armentano Oller, & Martínez-Abadías, 2022). Before the physical structures detection, it is crucial to complete the correct location of anthropometric marks on the human form. Before a tutor can teach students to master the techniques of detecting human anthropometrical points and body types

with their proportions, they must gain profound information and perception of human osteological material or bony architecture (Rathia, Rathore, John, & Ukey, 2023).

In the classical Physical Anthropology study course, teaching human osteological points allows students to become familiar with touching and detection, recognize them from each other and distinguish between their morphological characteristics, composition, shapes and sizes. It should be noted that differences exist between natural (fixed) and digital points (Heymsfield et al., 2018). Fixed anthropometric points and their positions should be visible and always on the same body part. Virtual anthropometric points can change position based on the bodily pose, and these marks cannot always be localized in the same place. Their determination is related to the competencies of the assessor.

The present examination has numerous strong points. As far as we know, this investigation is the earliest survey in our homeland to obtain the use of the Anatomage Table in detecting anthropometrical points and to begin using this technology in teaching the Physical Anthropology study course. However, there are some limitations, too. The main reasons for them are that current case study research is related to the new study design in a specific place and time, comprises a small number of tutors, and our limited ability to identify a complete anthropometrical investigation of the four virtual human bodies in the Anatomage Table. Nevertheless, this study helps us to understand general principles and directions about the Anatomage Table use process in teaching the Physical Anthropology study course.

Tutors can stimulate an appreciation for innovations in the Physical Anthropology study course and inspire their further academic performances. This area is worth watching closely for upcoming challenges and modernizations.

## **Conclusions**

Teaching Physical Anthropology benefits tutors' academic development and deepens an appreciation and an understanding of the virtual possibilities in the composition of the human body. The Anatomage Table was mandatory to verify precise indicators' location and confirm digital instruments for their detection over several human bodies. The findings showed several advantages and disadvantages compared to the traditional anthropometry field. Through this study, suggestions for the utilization of the Anatomage Table to gather essential anthropometrical information have been prepared. Despite that, future studies can aim to generate unique methods and supplemental procedures for getting anthropometrical data in contact with the Anatomage Table and using this technology in teaching Physical Anthropology study course.



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# TECHNOLOGIES FOR DEVELOPING THE CREATIVE POTENTIAL OF FUTURE VOCATIONAL TRAINING TEACHERS

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**Abstract.** *The article examines the important aspect of training future teachers of professional education, namely applying technologies to stimulate and develop their creative potential. The formation and development of the creative potential of an individual is of great importance in the context of the educational process and the formation of the future teacher, since modern society has set high demands on specialists regarding their professional qualities. Applying the technologies for developing student's creativity is a key element of the modern educational process aimed at stimulating creative thinking and personal development of the future specialist. The article explores current challenges associated with preparing future professional education educators for the implementation of educational technologies that stimulate the unfolding of learners' creative potential. The materials of this study focus on the issue of technologizing the educational process in higher education institutions, which will contribute to its qualitative improvement, wider adoption of innovative approaches, modern development tools, teaching methods, and forms that will ensure the development of learners' creative abilities. The concept of pedagogical technology is examined, its essence and classification are revealed, and aspects of implementing a technological approach in the educational process of preparing future professional education educators are highlighted. The results of the experimental research presented in the article emphasize the importance of using modern pedagogical technologies and draw attention to the need to search for rational ways of teaching, develop modern principles, and justify the specifics of their implementation that meet the requirements for education aimed at shaping and developing the creative personality of the future professional. The article highlights the practical experience of implementing educational technologies in the institutions of higher education and defines the effective methods of evaluating and supporting the creative potential of students. The key aspects that contribute to the improvement of the professional development of future specialists and the*

*creation of conditions for their creative self-expression in the educational process and the further professional activities were considered.*

**Keywords:** *creativity, creative abilities, creative potential, educational technologies, personality, technologies, vocational training teacher.*

## **Introduction**

Modern society makes new demands on the higher education system. At the time of graduation, students must not only possess knowledge, but also be capable of active, independent activity, cooperation, and be ready to flexibly adapt to social changes. In this regard, one of the priority tasks of developing the modern educational process is forming the active personality capable of productive decisions. In higher education institutions (HEIs) of Ukraine, the problem of applying technologies that ensure forming and developing the creative potential of students has become relevant.

Optimization of the education system in Ukraine aimed at its integrating into the European educational space is impossible without stimulation and activation of the student's creative abilities as a guarantee of the personal self-development and professional self-realization. The degree of implementation of the technological approach is one of the key criteria that guarantees the systematicity, purposefulness, efficiency and effectiveness of the activity of higher education institutions. Due to the implementation of technologies in the field of education, the interest of students in learning increases, it becomes possible to establish the connection between the educational material and real life, the necessary professional competences are formed, and personally oriented and differentiated approaches to the process of forming the creative potential of the student are implemented.

Modern technologies make the necessary toolkit of the educational process of higher educational institutions of the pedagogical profile. They contain the powerful prospect of improving the quality of the professional skills, revealing creative abilities and creativity of future teachers of the professional education during university training. Creative activity organized by the means of the pedagogical technologies forms the personality of the students, helps them to reveal their knowledge, abilities, skills and abilities, ensuring the development of the creative potential.

The purpose of the article is to generalize the theoretical information about the main content of the concept of technology and its implementation in the educational process of the higher education for the development of creative potential in training future teachers of vocational training.

The research applies the theoretical, empirical, and mathematical and statistical methods of processing the empirical data.

## **Literature review**

The analysis of the scientific research and literary sources made it possible to determine that the problem of the creative potential of the personality, the impact of applying creativity development technologies on the educational process was investigated by many scientists. Thus, the origins of the study of technology in education can be found in the works of Ya.-A. Comensky (Komensky, 1940), B. Skinner (Skinner, 1968), B. Bloom (Bloom, 1956). The implementation of modern pedagogical technologies in the educational process was studied in the researches of P. Sikorskyi (Sikorskyi, 2021) O. Antonova (Antonova, 2015), O. Yankovych (Yankovych, Bednarek, Andzheyevska, 2015), O. Baranovska (Baranovska, Kosianchuk, Trubachova, Chornous, 2018), V. Starosta, (Starosta, 2019), O. Budnyk (Budnyk, Nikolaiesku, 2022), V. Kovalchuk (Kovalchuk, 2017, 2018, 2021, 2022), H. Vaskivska (Vaskivska, 2018), B. Vovk (Vovk, Matviienko, 2020) and others define the main methodical requirements that must be met by the technologies of modern education. However, despite the significant amount of the research, the problem of applying technologies for developing the creative potential of the future teachers of professional education requires the more thorough study.

## **Theoretical grounding the problem**

Modern requirements for the professional training of future teachers of professional education require the need to make changes in this process. These changes are connected with the fact that nowadays not only in-depth knowledge is required from the future specialists, but also the ability for constant learning and creative self-development. Considering this, there is a need to find new forms, methods and technologies of learning that will allow future teachers of vocational training to acquire the necessary competencies for the development and realization of their own creative potential while performing the educational and professional activities. In the holistic educational process, forming and developing the creative abilities of students takes place with the help of technologies.

The word “technology” comes from the fusion of two Greek words *techne* – art and *logos* – skill, teaching. Learning technologies have been used in education since the ancient world, long before the term “technology” was introduced into circulation. One of the first to understand that education can be organized using certain methods and techniques was Ya.-A. Komensky (Komensky, 1940). He suggested using interactive and problem-based learning methods, which became the basis for the development of interactive and project technologies. In the 1930s, a new stage of the development related to the use of technical means in education began in pedagogy. This stage was called “technization” and marked the

beginning of the first period of development of world-class educational technologies. In the second half of the 20th century, there was an awareness in pedagogy that technology is not just a means of learning, but also has an impact on its content and methods. This led to the change of the term “technology in education” to “educational technology”. Thus, the American scientists B. Skinner (Skinner, 1968) and B. Bloom (Bloom, 1956) believed that traditional teaching does not ensure effective achievement of the educational goals. In their opinion, the educational process should be more targeted and effective. They suggested setting concrete, measurable tasks before training, which would allow to assess the success of their achievement.

Later, the term “educational technologies” began to be understood as a set of methods, means and forms of organization of the educational process aimed at achieving the specific educational goals. The end of the 20th century was marked in education by the technological revolution associated with the wide implementation of information and communication technologies (ICT). These technologies made distance learning possible, which has become one of the most common forms of education in the modern world (Yankovych, Bednarek, Andzheyevska, 2015).

Educational technologies make a broad concept that includes didactic technologies, educational technologies, digital technologies, etc. In modern conditions, when the content of the education is updated, it is especially important to systematically work on improving the professional competence of teachers and introducing modern technologies into the educational process, which contribute to the development of the creative potential of students. In higher education institutions, in training future teachers of the vocational education, an important place is given to the interrelationship of various educational technologies with the aim of revealing their creativity, originality, which is the key to the further professional self-realization. Thus, didactic technology in modern professional education is not just a set of methods and means of learning, but a complete system that covers all the stages from setting goals to organizing and conducting classes. It is aimed at the effective development of future specialists and is a flexible educational model that allows adapting to different conditions. Nowadays, various didactic technologies aimed at developing creativity, critical thinking of the future teacher of the vocational education are widely used in higher education institutions. Among them, the most popular are interactive, game, project technologies, as well as technologies of cases, problem-based learning, etc.

In modern classes, interactive learning is gaining more and more popularity, which has a number of advantages compared to the traditional one, ensuring the active participation of students in the educational process, involving in the individual, pair, group activities, applying tasks of the creative nature (Starosta, 2019). The most common methods of implementing interactive technologies aimed at developing the creative potential in training future teachers of vocational

education include “Aquarium”, “Brainstorming”, “Microphone”, “Journalist”, “Unfinished sentences”, etc.

Game technologies are among the oldest and most effective educational technologies. They represent a large group of methods and techniques that are implemented with the help of various pedagogical games. A game is an activity that can last from a few minutes to an hour or more and is used both in the classroom and in extracurricular activities. The choice of the type of game depends on the specific goals and educational tasks (Kovalchuk, 2017). In higher education institutions while training future teachers game technologies serve as a method of learning that uses games to achieve the educational goals, in particular with the aim of developing the creative potential of students.

In modern conditions, project technology is successfully and actively developing, as it meets the modern requirements of education. This technology involves the active participation of students in the process of assimilation of knowledge through the non-standard, creative approach to the practical solution of tasks – projects. While training future teachers of vocational education, project technology has a number of advantages over the traditional training: it improves knowledge assimilation; forms teamwork and communication skills, develops creative abilities and critical thinking skills. Participation in projects helps students of higher education institutions to become more competitive and successful in life.

The technology of problem-based learning which involves the creation of problem situations that encourage learners to independently search for knowledge and solve educational tasks through the non-standard approach, occupies an important place among the educational technologies in the higher education institutions. An important factor in the successful application of problem-based learning is the creative approach of the teachers themselves. As H. Radchuk notes, they should be able to create conditions for creative self-expression of students, help them find new ideas and solutions, develop their critical thinking, believe in their capabilities (Radchuk, 2014). Nowadays, problem-based learning is an effective didactic technology that contributes to the development of thinking, creativity and independence of future teachers of the vocational education.

In the higher education institutions of Ukraine, there is a growing interest in innovative learning technologies, in particular, in case technology. It involves consideration of real problem situations that require the application of knowledge and skills to solve them. When training future teachers of vocational education, the use of this technology makes the educational process more effective and interesting, contributing to the deepening of the theoretical knowledge, the acquisition of the practical skills, the development of creativity and creative potential.

An important component of the modern educational process is made by the educational technologies that are directly aimed at the comprehensive



development of the students' personality, the formation of their value orientations and social skills. Educational technologies are implemented in various forms, in particular, through participation in cultural and mass events, which allows students' developing creative abilities, forming communication and cooperation skills; participating in students self-government which is the key to the development of leadership qualities, decision-making skills and responsibility (Vovk, Matviyenko, 2020). Based on the research of the scientists, educational technologies that have the greatest impact on developing the creativity of future teachers of the professional education include personally oriented education, collective creative education technology, "creating the situation of success" technology, students team formation technology, show technologies, etc. Applying these technologies is directly related to all the didactic technologies, which contributes to the better disclosure of the creative personality of the future specialist.

Among the educational technologies, the modern world has given an important place to digital technologies. They have become necessary not only for higher education, but also for various spheres of life, for the successful professional activity. The accelerated development of digital technologies is taking place and is being implemented in the educational process. An important aspect of the digital transformation of education is the use of computer software in the study of all disciplines. This makes learning more effective and interesting, and also contributes to the formation of the digital culture and the development of the search for creative solutions when performing tasks (Budnyk, Nikolaiesku, 2022).

So, based on the above mentioned, it is worth emphasizing that the educational technologies, characterized by innovation, integration, and diversification, are an important tool that makes the process of training future teachers of professional education in the higher education more effective and relevant for the modern world. They contribute to the improvement of the quality of education, the development of the key competencies of the students and their successful creative professional activity in the future.

### **Research methodology**

To determine the influence of the educational technologies on the development of the creative potential of future teachers of vocational training, the study was conducted on the basis of Oleksandr Dovzhenko Hlukhiv National Pedagogical University and Volodymyr Hnatyuk Ternopil National Pedagogical University. The study included applying the following methodical tools: comparative method of research organization; stating and forming experiments, questionnaires, testing, observation, conversation, analysis; quantitative and qualitative data analysis, as well as methods of the mathematical statistics, such

as descriptive statistics, correlation analysis, Student's test and Fisher's test (Romakin, 2006; Shevenko, 2016). As the main means of diagnosis, the following methods of evaluating the motivational component of H. Kostyuk (Kostyuk, 1989), the self-actualization test and the interpersonal diagnosis method (Shevenko, 2016) were used. E. Torrance's tests (Torrance, 1974) were used to diagnose the creative potential in the conditions of the higher education. The method of self-assessment of creative abilities, developed on the basis of D. Johnson's methodology, was used to assess the creative abilities (Johnson, 2003) etc.

### Research results

Within the framework of the research problem, the following components of the students' creative abilities were distinguished: motivational (motives reflecting conscious motivations for activity; the individual's focus on creative assimilation and application of knowledge, the formation of creative skills and the development of abilities), cognitive (knowledge in the field of solving creative tasks and creating projects), operational (skills in solving creative tasks and implementing projects); creative (creative abilities necessary for solving creative tasks).

Based on the selected components, the special diagnostic map of the process of developing students' creative potential was developed which contained the levels of development of the specified components (high, medium, low). This diagnostic map made it possible to carry out the diagnostics and pedagogical correction of the components of creative abilities of future teachers of vocational training in the pedagogical experiment.

*Table 1 Analysis of levels of creativity components development before the experiment (vreated by authors)*

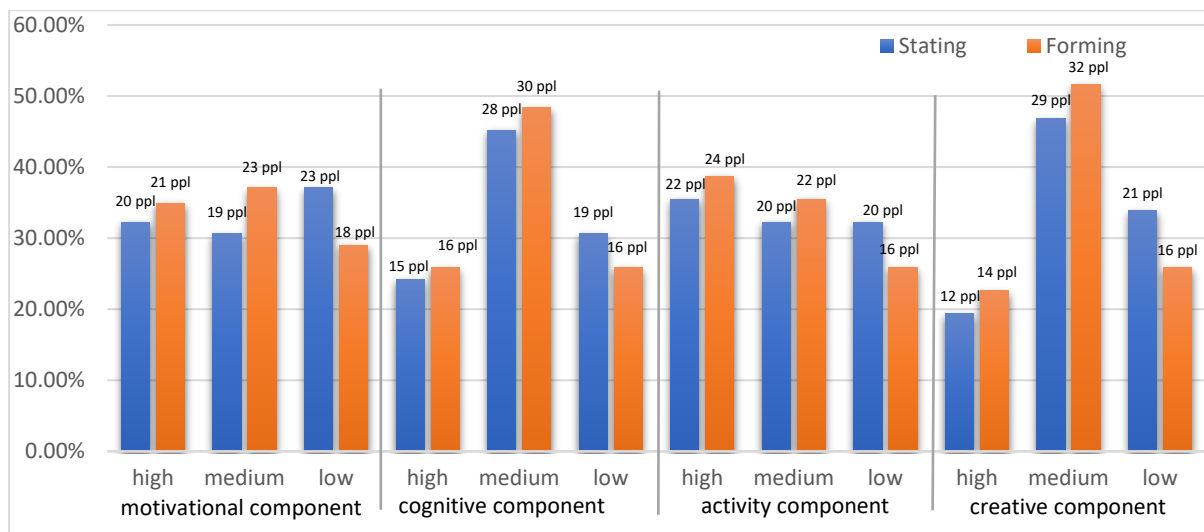
Development components	Experimental group			Control group		
	high	medium	low	high	medium	low
motivational	18 (29,03%)	21 (33,87%)	23 (37,1%)	20 (32,26%)	19 (30,65%)	23 (37,1%)
cognitive	13 (20,97%)	24 (38,71%)	25 (40,32%)	15 (24,19%)	28 (45,16%)	19 (30,65%)
activity	15 (24,19%)	23 (37,1%)	24 (38,71%)	22 (35,48%)	20 (32,26%)	20 (32,26%)
creative	14 (22,58%)	26 (41,94%)	22 (35,48%)	12 (19,35%)	29 (46,77%)	21 (33,87%)

In total, 62 third-year students were involved in the experiment: control group – 30 participants, experimental group – 32 participants. The stating stage

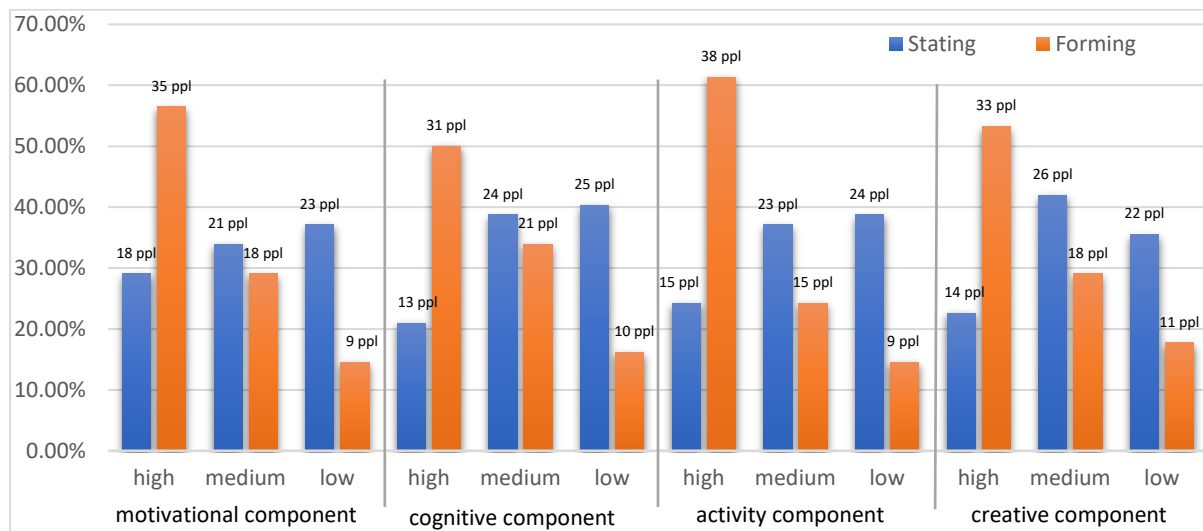
of the experiment was aimed at diagnosing the initial level of creative capabilities of the respondents. Diagnosis of the initial level of creativity was carried out using the above-mentioned methods based on the developed diagnostic map.

It can be seen from Table 1 that before the forming experiment, the control and experimental groups did not significantly differ from each other in terms of the level of development of creative potential. However, it is worth noting the dominance of medium and low levels.

At the forming stage, purposeful organization of the research and experimental work was carried out to test the created technology for developing the creative potential of future teachers of vocational training. The control group studied the programme material in the traditional form. In the experimental group, the educational process took place according to the methodics developed by us, which included the educational activities by way of applying the set of the educational technologies that contribute to the development of creativity and the creative potential of students: problem situations, project work, defending creative tasks, organization of business and role-playing games, the use of heuristic methods, organization of collective and individual creative activity, reflection, etc. Educational technologies and digital technologies, including text, graphic editors, presentation editors, modelling programmes, Internet technologies, etc., were used in close connection. They solve didactic tasks of creative classes and differ from standard ones, requiring constructive motivation, intellectual activity of students, avoiding stereotypes, flexibility of thinking, imagination, etc. At the end of the forming stage of the pedagogical experiment, the re-diagnosis of the level of development of the creative potential of future teachers of the professional education was carried out.



*Figure 1 Analysis of levels of development of creativity components in the control group after the experiment (created by authors)*



*Figure 2 Analysis of levels of development of creativity components in the experimental group after the experiment (created by authors)*

At the end of the experiment, the analysis of changes in the experimental and control groups was carried out. Based on the methods of E. Shostrom, T. Leary, E. Torrens, D. Johnson, H. Kostyuk, J. Gilford, and others, in order to determine the level of changes caused by the developed by us methodics. Based on the obtained data (shown in Figure 1 and 2), the results of the control and experimental groups were compared before the beginning and after the end of the experiment.

Diagram 1 shows unchanged significantly indicators in the levels of development of the creative potential of the control group. The analysis of the data in Diagram 2 shows that the following changes were observed in the experimental group: – the dynamic of the high level growth by 27.42% and the decrease of the low level to 14.52% from 37.1 was recorded for the motivational component; – according to the cognitive component, 50.0% of respondents reached the high level and the number of students with the low level of creative abilities decreased by 24.19%; – according to the activity component, the number of students with the high level increased by 37.5% and with the low level decreased from 38.71% to 14.52%; – according to the creative component, there was an increase in the number of students with the high level by 29.65%, the decrease in the number of students with the medium level by 12.91% and with the low level by 17.74%.

Thus, the conducted experiment confirmed the suggested hypothesis that the educational process in the higher education institutions organized on the basis of applying educational technologies for developing the creative potential is effective, contributing to the increase in the level of creativity and creative capabilities of future teachers of vocational training, which is a guarantee of their

professional self-realization and, as a result, the formation of the competitive specialist in demand at the labour market.

## Conclusions

In the modern educational environment training future teachers for effective work in conditions of rapid changes is an important task. Technologies for developing the creative potential are becoming a key tool for achieving this goal. Educational technologies encompass a set of methods, techniques, and tools that assist educators in making their work more effective and learning more engaging and productive for learners. The integration of various technologies during education in higher education pedagogical institutions contributes to the development of competencies necessary for successful future professional activity. The research focused on the study of the effectiveness of applying educational technologies in the process of training future teachers of professional education. For developing the creative potential, we consider the most effective to be interactive, game, project technologies, case technologies, problem-based learning, personally-oriented technologies, the technology of “creating a situation of success”, show technologies, etc., which are used in close interaction with the modern digital technologies.

The results of the study confirmed that applying technologies for developing the creative potential helps to increase the professional competence of future teachers. Students who participated in the pedagogical experiment showed the higher level of creativity and innovative thinking. Therefore, our results indicate the need to introduce technologies for developing creative potential into pedagogical practice. This will help to ensure quality training of future teachers for modern challenges and ensure their successful professional activity in the future.

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# IZGLĪTĪBAS IESTĀŽU VADĪŠANA: JURIDISKĀS PRASĪBAS LĪDERĪBAS KONTEKSTĀ

## *Managing Educational Institutions: Legal Requirements in the Context of Leadership*

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**Abstract.** *The research analyses the problem of recruiting managers of educational institutions, paying special attention to the leadership aspect. The topicality of the article is related to the fact that in the Republic of Latvia positions of this level require the holding of job competitions, which is why the mentioned competitions are held regularly. The research novelty: interdisciplinary research analyzing scientific articles, Latvia's education policy documents and normative legal acts, announcements of job competitions in the official publication of the Republic of Latvia "Latvijas Vestnesis" - using comparison, deduction and induction methods were carried out. A summative content analysis was performed. The research aim is to find out to what extent the leadership aspects are taken into account in job contests (for the management of education institutions - rector of a higher education institution or a director of college). 70 advertisements (in competitions for the position of higher education institution rector) for the period from 2004 to 2023, as well as 18 advertisements (in competitions for the position of college director) for the period from 2008 to 2022 were analyzed. As a result of the analysis, it was concluded that, despite the content of regulatory legal acts, the demand for leadership positions as a tender announcer is extremely rare. The authors of the article propose to normatively strengthen the obligation of the organizer of the job competition to include the leadership requirement as mandatory, as well as to develop a system of leadership tests at the national level.*

**Keywords:** *educational institutions, leadership, rector, director of college, legal requirements*

### **Ievads**

#### ***Introduction***

Mūsdienu vadībzinātne, papildus komunikācijai un motivācijai, vadības jēdzienā iekļauj arī līderību. Raksta ietvaros autori definē līderību ne tikai kā uzvedības modeļu kopumu, ko izmanto mēģinājumos ietekmēt citu cilvēku uzvedību, bet arī kā procesu, kura mērķis ir ietekmēt grupas darbību organizācijā attiecībā uz tās mērķu definēšanu un mērķu īstenošanu. Tieši šim līderības

aspektam (izglītības iestāžu vadītāju atlases kontekstā) ir veltīts autoru pētījums. Pētījuma mērķis ir noskaidrot, cik lielā mērā līderības aspekts ir ņemts vērā normatīvajos tiesību aktos un amatu konkursos (pētījuma metode - kontentanalīzes metode).

Izvēlēta virziena aktualitāte ir saistīta ar to, ka Latvijas Republikā koledžu direktoru amatiem un augstskolu rektoru amatiem ir nepieciešams rīkot amatu konkursus, tāpēc minētie konkursi notiek regulāri. Pētījuma novitāte ir saistīta ar to, ka pētījums aptver jaunu pasākumu ieviešanas izaicinājumus.

Izglītības iestāžu vadīšanai, neapšaubāmi ir savas īpatnības – ja mēs traktējam izglītības iestāžu vadīšanu kā darbību sistēmu, kas saistīta ar pieejamo resursu (materiālo resursu, psiholoģisko resursu, personāla resursu) racionālo izmantošanu, lai īstenotu izglītības sistēmas un izglītības iestādes mērķus, tad absolūti likumsakarīgi, ka līderība izglītībā ir saistīta ar citu cilvēku rīcības ietekmēšanu, lai sasniegtu izglītības organizācijas mērķus, veicot tādas funkcijas kā plānošana, organizēšana, vadīšana, koordinēšana un kontrole. Lai gan izglītības iestādes ir sarežģītākas nekā citas organizācijas un atšķirības starp akadēmisko aprindu un privātā sektora kultūru ir visai būtiskas (Wang & Frederick, 2018), arī izglītības iestādes tiek pārvaldītas ņemot vērā vadībzinātnes atziņas.

Zīmīgi, ka vadībzinātnei attīstoties, ir bijusi mēģinājumi pielietot vadības principus arī izglītības nozarē, tomēr pietiekoši ātri kļuva skaidrs, ka izglītības nozares īpatnības prasa vadības principu pielāgošanu. Jau vairāk nekā pirms gadsimta tika iezīmēti vairāki vadības principi, kuri vēlāk transformējās. Šo principu vidū bija darba dalīšana; organizācijas efektivitātes uzlabošana; autoritātes princips; disciplīnas princips (noteikumi ir jāpiemēro godīgi un saprātīgi vadības kvalitāte nosaka grupas disciplīnu); pavēļu vienotības princips (lai izvairītos no problēmām ar autoritāti un disciplīnu); virziena vienotības princips - līderim jābūt atbildīgam par pasākumu plānošanu un par mērķiem (Fayol, 1916).

## **Literatūras apskats**

### *Literature review*

21.gadsimtā daudz lielāka uzmanība tika pievērsta tieši līderības kontekstam. Piemēram, pētījumos tika uzsvērta līdera uzvedība ar iedvesmojošu ietekmi (Larsson, Höglund & Henrysson, 2024); līderības prakses efektivitāte tiek skaidrota ar nākotnes cerībām, izmantojot emocionālo inteligenci kā ietekmēšanas stratēģiju (Acosta-Prado, Zárate-Torres, Tafur-Mendoza, Prada-Ospina, & Sarmiento, 2023); tika secināts, ka transformējošai vadībai (morāles modelēšanai, vīzijas motivācijai, individualizētai apsvēršanai un harizmai) ir būtiska pozitīva ietekme uz vidējā līmeņa vadītāju radošumu (Al-Khateeb,



Ayasrah, Beirat, & Yahya, 2023), kas pozitīvi ietekmē vidējā līmeņa vadītāju psiholoģisko drošību (Zheng, Tang, Wei & Xu, 2023).

Pārlicinoši pierādījumi liecina, ka attiecību veidošanas un uz cilvēkiem orientēti projektu vadītāji, kuri izmanto efektīvu komunikāciju un sadarbību, tiek augstu novērtēti salīdzinājumā ar projektu vadītājiem, kas orientēti uz uzdevumiem (Rehan, Thorpe & Heravi, 2024). Tāpat, atbalstoša vadība un ģimenes sociālais atbalsts pozitīvi ietekmē vadītāju organizatorisko efektivitāti (Park, Kim & Lee, 2023), bet naudas atlīdzības stimulē augstākajiem vadītājiem pozitīvi ietekmē organizācijas sniegumu, balstoties uz organizācijas noturību (Chen, Li, Hu, & Yu, 2023). Zīmīgi, ka arī tālākizglītībā atbalstoša augstākās vadības komanda un nepārtraukta profesionālā attīstība tika minēti kā faktori, kas ļauj šiem pedagoģiskajiem speciālistiem izmantot savu ekspertu praksi un uzplaukt (James Relly, 2021).

Padziļināta uzmanība tiek pievērsta arī ētiskumam (Kipane, Vilks, Krivinch, 2023) - vadītāju ētiskā vadība parasti tieši un pozitīvi ietekmē darbinieku darba rezultātus un primāri tas ir saistīts ar "orientēšanos uz citiem", ko veicina priekšstats, ka morālās vērtības (godīgums) ir iestrādātas organizācijas kultūrā (Ruiz-Palomino, Linuesa-Langreo, Rincón-Ornelas & Martinez-Ruiz, 2023).

Kopumā, mūsdienās ir nostabilizējies viedoklis, ka vadības principu piemērošana izglītības nozarē sniedz būtisku ieguldījumu izglītības organizāciju efektivitātē, īpaši, kad pastāv daudzi būtiskie izaicinājumi, tajā skaitā digitalizācija - datu vērtības izpratne, uz datiem balstīta lēmumu pieņemšana (Philip, Gilli & Knappstein, 2023), Eiropas Savienības struktūrfondu piesaiste, publisko iepirkumu rīkošana (Krivīņš & Vilks, 2013) u.c. Katrs no izaicinājumiem ir saistīts ar iestādes vadītāja kompetenci, prasmēm un iemaņām, kuru neesamība apdraud ne tikai izglītības iestādes (un līdz ar ko visas izglītības sistēmas) darbību, bet apdraud arī pašu iestādes vadītāju. Piemēram, publisko iepirkumu sfēra ir cieši saistīta ar korupcijas riskiem un kukuļošanu, uz ko norāda ne tikai zinātniskā literatūra (Krivins, 2018), bet arī iestāžu vadītāju intervijas (Krivins, 2014). Gadījumā, ja nezināšana vai prasmju neesība Eiropas Savienības struktūrfondu griezumā kriminalizēsies (Remeikiene, Gaspareniene, Fedajev, Raistenskis, & Krivins, 2022), tad iestādes vadītājs var tikt saukts pie kriminālatbildības (Teivāns-Treinovskis, Jefimovs, Velika, & Krivīņš, 2022). Daudzi interesanti aspekti ir aplūkoti arī visai noderīgā izdevumā "The Higher Education Manager's Handbook: Effective Leadership and Management in Universities and Colleges: Third edition" (McCaffery, 2018).

Ja padziļināti pievēršties izglītības iestāžu vadīšanas īpatnībām, būtu jāņem vērā arī pilnvaru deleģēšanas aspekts, mērķu vadīšanas aspekts un kontroles apjoma aspekts (Lindberg, Skytt, Lindberg, Wijk & Strömberg, 2023) – un visu šo aspektu ievērošana nav iespējama bez līderības. Atsauce uz līderības nozīmīgumu ir iekļauta arī Ministru kabineta 2021. gada 22. jūnija rīkojumā Nr. 436 "Par Izglītības attīstības pamatnostādņem 2021.-2027.gadam" (MK, 2021),

proti, šajā vidēja termiņa politikas plānošanas dokumentā ir noteikta vienota valsts politika un attīstības stratēģija izglītībā no 2021. gada līdz 2027.gadam. Dokumentā teikts, ka ir “plānota izglītības iestāžu vadības kapacitātes un kompetenču attīstība vispārējā, profesionālajā, profesionālās ievirzes, interešu un augstākajā izglītībā”(MK, 2021). Proti, “vadītājiem, lai veiksmīgi organizētu nākotnes pārmaiņas, būs nepieciešamas tādas prasmes kā spēja būt par pārmaiņu līderi, pārmaiņu procesa un pretestības vadība, krīzes situāciju un risku stratēģiska vadība, nākotnes situācijas redzējums, izglītības procesa plānošana un vadība, resursu nodrošināšana, iekšējās un ārējās vides apzināšana, digitalizācijas procesu stratēģiska plānošana un vadība, mērķtiecīga komunikācija, uzticības veidošana un citas prasmes” (Somerville & Whelan-Berry, 2009).

Teorētiskajā plāksnē var identificēt četrus vidējā līmeņa līderības modeļu veidus: pedagoģisko, atbalstošo, pārmaiņu un administratīvo (Moshel, & Berkovich, 2023). Šajā kontekstā jāpievērš uzmanība tam, ka daudzas īpašības, kurām bija liela nozīme agrāk (piemēram, stingrība, birokrātiskā uztvere), tagad ir novecojušas un ir visai tālu no īsta līdera tēla un līderības profila. Tāpēc būtiski ir arī tas, kā personas, kas ieņem oficiālus vadošus amatus izglītības iestādēs, uztver sevi līdera lomā un savas līderības attīstību (Calma, 2015) – jo pastāv pozitīva saikne starp augstākā līmeņa vadītāju stratēģiskās vadības līmeņiem un vadīšanas kapacitāti (Coban, Ozdemir & Pisapia, 2019).

Prezentētais teorētiskais apskats liecina par to, ka neviens koledžas direktors un neviens augstskolas rektors savā ikdienas darbā nevar ignorēt līderības aspektu.

## **Metodoloģija** *Methodology*

Pētījuma mērķis bija izprast līderības elementa nozīmi izglītības iestāžu vadītāju atlases problemātikas kontekstā – respektīvi, cik lielā mērā līderības aspekti tiek ņemti vērā amatu konkursos (izglītības iestāžu vadībai - augstskolas rektors vai koledžas direktors). Šim nolūkam tika izvēlēta kontentanalīzes metode. Pētniecības fokuss bija koncentrēts divos virzienos: juridiskā dimensija un praktiskā dimensija. Pēc teorētiskā ietvara iezīmēšanas bija vispusīgi jāaptver attiecīgas informācijas stigmatizācija. Turklāt bija jāpanāk, lai analīzes līmenis nodrošinātu apmierinošu datu pārvaldību praktiskā līmenī. Lai atrisinātu šo problēmu, tika analizēti gan aktuālo normatīvi-tiesisko regulējumi, gan amatu konkursu sludinājumi oficiālajā izdevumā "Latvijas Vēstnesis".

Proti, pētījums īstenots kā starpdisciplinārs pētījums, kurā analizēti zinātniskie raksti, Latvijas izglītības politikas dokumenti un normatīvie tiesību akti, amatu konkursu sludinājumi Latvijas Republikas oficiālajā izdevumā "Latvijas Vēstnesis" - izmantojot salīdzināšanas, dedukcijas un indukcijas metodes. Tika veikta apkopojosa satura analīze.

Pētījuma robežas ir saistītas galvenokārt ar atsevišķu izglītības iestāžu (koledžu un augstskolu) analīzi. Lai arī “atbilstoši profesionālās izglītības iestādē iegūstamajai izglītībai un profesionālajai kvalifikācijai Latvijas Republikā šobrīd ir šāda statusa profesionālās izglītības iestādes: 1) tehnikums; 2) mākslu izglītības kompetences centrs; 3) profesionālā vidusskola; 4) profesionālās tālākizglītības centrs un 5) koledža” (LR Saeima, 1999), tomēr papildus augstskolām esam izvēlējušies analizēt vienīgi koledžas. Minētā izvēle ir saistīta ar koledžu īpašu vietu Latvijas izglītības institucionālajā sistēmā, par ko tiks sniegti komentāri raksta citās nodaļās. Pētījuma robežas iezīmē arī tas, ka autoru pētījuma mērķi nav bijuši analizēt kādi ir bijuši personu iemesli pieteikties konkrētajam amatam, katra konkrētā kandidāta kvalifikācija un īpašības, koledžas direktora vai rektora mijiedarbības kvalitāte ar personālu, ar izglītojamiem, ar uzraugošajām institūcijām u.c.

Pētījuma autori saņēma apmierinošus datus, sniedzot atbildi uz galveno jautājumu, kas radīja satraukumu - līderības komponentes nozīmi koledžu un augstskolu vadītāju atlases procesā mūsdienu Latvijā. Tā ir pētījuma autoru empīriskā pētījuma zinātniskā vērtība.

*1.tabula Analizētie sludinājumi koledžu direktoru amatu konkursiem (autoru veidota)*  
 Table 1 Analyzed advertisements for competitions for the positions of college principals  
 (created by authors)

Sludinājuma kods pētījumā	Sludinājuma datums un numurs izdevumā "Latvijas Vēstnesis"
K01	19.05.2022. OP 2022/96.AKK2
K02	08.12.2020. OP 2020/237.AKK2
K03	13.11.2020. OP 2020/221.AKK1
K04	02.09.2020. OP 2020/169.AKK1
K05	28.05.2020. OP 2020/102.AKK5
K06	23.12.2019. OP 2019/257.AKK1
K07	05.12.2019. OP 2019/245.AKK4
K08	17.07.2018. OP 2018/140.AKK15
K09	03.07.2018. OP 2018/131.AKK6
K10	21.04.2018. OP 2018/80.AKK8
K11	17.01.2018. OP 2018/12.AKK15
K12	10.08.2016. OP 2016/153.AKK8
K13	10.08.2016. OP 2016/153.AKR5
K14	28.06.2013. OP 2013/123.AKK1
K15	22.01.2013. OP 2013/15.AKK5
K16	27.04.2012. Nr. 66
K17	21.06.2011. Nr. 96
K18	25.01.2008. Nr. 14

Pētījuma materiāla pirmā grupa sastāv no normatīvajiem tiesību aktiem. Latvijas Republikā koledžas darbību reglamentē uz Izglītības likums (LR Saeima,

1998), Profesionālās izglītības likums (LR Saeima, 1999), Augstskolu likums (LR Saeima, 1995) un citi normatīvie akti, kā arī uz attiecīgās koledžas nolikums, kuru izdod atbilstoši kārtībai, kas noteikta Profesionālās izglītības likumā. Izglītības likums un Augstskolu likums ir attiecināmi arī uz augstskolu darbību.

Pētījuma materiāla otrā grupa sastāv no 88 amatu konkursu sludinājumiem: 18 sludinājumi konkursos uz koledžas direktora amatu par laika posmu no 2008. līdz 2022.gadam, kā arī 70 sludinājumi konkursos uz augstskolas rektora amatu par laika posmu no 2004. līdz 2023. gadam.

Pētījumā analizētie amatu konkursu sludinājumi ir uzskaitīti 1. tabulā un 2. tabulā. Katram sludinājumam pētījuma ietvaros ir piešķirts kods.

*2.tabula Analizētie sludinājumi augstskolu rektoru amatu konkursiem (autoru veidota)*  
*Table 2 Analyzed advertisements for competitions for the positions of university rectors*  
*(created by authors)*

<i>Kods</i>	<i>Sludinājuma datums un numurs izdevumā "Latvijas Vēstnesis"</i>	<i>Kods</i>	<i>Sludinājuma datums un numurs izdevumā "Latvijas Vēstnesis"</i>	<i>Kods</i>	<i>Sludinājuma datums un numurs izdevumā "Latvijas Vēstnesis"</i>
R01	20.12.2023. OP 2023/246.AKK1	R25	21.11.2018. OP 2018/229.AKK9	R49	15.09.2010. Nr. 146
R02	04.12.2023. OP 2023/234.AKK1	R26	02.11.2018. OP 2018/217.AKK2	R50	16.03.2010. Nr. 42
R03	03.10.2023. OP 2023/191.AKK2	R27	18.04.2018. OP 2018/77.AKK2	R51	11.03.2010. Nr. 40
R04	25.09.2023. OP 2023/185.AKK1	R28	06.12.2017. OP 2017/242.AKK1 7	R52	09.03.2010. Nr. 38
R05	12.04.2023. OP 2023/71.AKK1	R29	26.10.2017. OP 2017/213.AKK1	R53	04.03.2010. Nr. 36
R06	01.03.2023. OP 2023/43.AKK1	R30	02.05.2017. OP 2017/86.AKK9	R54	21.07.2009. Nr. 114
R07	23.01.2023. OP 2023/16.AKK1	R31	05.04.2017. OP 2017/70.AKK7	R55	16.07.2009. Nr. 112
R08	03.01.2023. OP 2023/2.AKK1	R32	04.10.2016. OP 2016/192.AKK2	R56	12.05.2009. Nr. 72
R09	08.11.2022. OP 2022/217.AKK4	R33	07.10.2015. OP 2015/196.AKK6	R57	08.05.2009. Nr. 71
R10	12.09.2022. OP 2022/176.AKK1	R34	03.03.2015. OP 2015/44.AKK1	R58	03.03.2009. Nr. 34
R11	07.09.2022. OP 2022/173.AKR1	R35	30.12.2014. OP 2014/257.AKK8	R59	11.02.2009. Nr. 23
R12	16.08.2022. OP 2022/157.AKK1	R36	29.12.2014. OP 2014/256.AKK3	R60	21.01.2009. Nr. 11
R13	18.07.2022. OP 2022/136.AKK2	R37	27.10.2014. OP 2014/212.AKK3	R61	20.11.2008. Nr. 180
R14	07.07.2022. OP 2022/129.AKK3	R38	04.09.2014. OP 2014/174.AKK2	R62	30.08.2007. Nr. 140

R15	01.07.2022. OP 2022/125.AKR1	R39	13.08.2014. OP 2014/158.AKK2	R63	07.06.2007. Nr. 91
R16	27.06.2022. OP 2022/121.AKK2	R40	27.06.2013. OP 2013/122.AKK2	R64	03.04.2007. Nr. 55
R17	16.06.2022. OP 2022/116.AKK2	R41	18.01.2013. OP 2013/13.AKK4	R65	29.03.2007. Nr. 53
R18	09.06.2022. OP 2022/111.AKK2	R42	18.05.2012. Nr. 77	R66	15.03.2007. Nr. 45(3621)
R19	01.06.2022. OP 2022/105.AKK3	R43	15.05.2012. Nr. 74	R67	26.10.2004. Nr. 169
R20	06.04.2022. OP 2022/68.AKK3	R44	03.05.2012. Nr. 69	R68	07.05.2004. Nr. 72
R21	26.01.2021. OP 2021/17.AKK2	R45	14.03.2012. Nr. 42	R69	05.03.2004. Nr. 36
R22	19.01.2021. OP 2021/12.AKK5	R46	09.03.2011. Nr. 38	R70	06.02.2004. Nr. 20
R23	18.06.2020. OP 2020/118.AKK4	R47	09.12.2010. Nr. 195		
R24	12.05.2020. OP 2020/90.AKK3	R48	01.10.2010. Nr. 156		

### **Būtiskākie pētījuma rezultāti un to interpretācija** *The main research results*

Šajā sadaļā autori iepazīstina ar normatīvi tiesisko regulējumu, kas skar raksta tematiku; komentē īpatnības, kas attiecas uz koledžas direktora amatu un augstskolas rektora amatu; identificē tiesību normas, kas ir vērstas uz procesa kvalitātes nodrošināšanu. Pētījuma ietvaros ir iegūti šādi rezultāti.

Profesionālās izglītības likuma (LR Saeima, 1999)17.<sup>3</sup> panta pirmā daļa konceptuāli nosaka, ka “profesionālās izglītības iestādes vadītāja tiesības, pienākumus un atbildību nosaka Izglītības likums” (LR Saeima, 1998). Analizējot minēto regulējumu, autori secina, ka Izglītības likuma 30.pants, kas regulē minētos jautājumus, ir vienlīdz attiecināms gan uz vadītājiem pirmsskolas izglītības iestādēs; gan uz direktoriem — “pamatizglītības, vidējās izglītības iestādēs, koledžās, profesionālās ievirzes, interešu izglītības iestādēs”; gan arī uz rektoriem — augstskolās (sk. Izglītības likuma 30.panta piekto daļu).

Visām vadītāju kategorijām ir jāatbild “par izglītības iestādes darbību un tās rezultātiem, par šā likuma un citu izglītības iestādes darbību reglamentējošo normatīvo aktu ievērošanu, kā arī par intelektuālo, finanšu un materiālo līdzekļu racionālu izmantošanu”, “par izglītības iestādes vadītāju ir tiesīga strādāt persona, kura prot un lieto valsts valodu normatīvajos aktos noteiktajā profesionālo un amata pienākumu veikšanai nepieciešamajā apjomā, izņemot citā likumā noteiktajā gadījumā” utml.

Vienlaikus, pastāv arī zināmas atšķirības. Lai arī “par izglītības iestādes vadītāju konceptuāli ir tiesīga strādāt persona, kurai ir nevainojama reputācija, kura ir lojāla Latvijas Republikai un tās Satversmei, tostarp nepārkāpj diskriminācijas un atšķirīgas attieksmes pret personu aizliegumu, kurai ir attiecīga izglītība un nepieciešamā profesionālā kvalifikācija” (LR Saeima, 1998), tomēr, pievēršoties tieši koledžas direktoru problemātikai, jāsecina, ka šādām personām likumdevējs ir izvirzījis arī papildus prasības: “par koledžas direktoru var iecelt personu, kura atbilst Izglītības likuma prasībām un kurai ir vismaz septītajam Latvijas kvalifikāciju ietvarstruktūras līmenim atbilstoša augstākā izglītība” (LR Saeima, 1999).

Latvijas Republikā “profesionālās izglītības iestādes direktoru iecel amatā iestādes dibinātājs. Valsts dibinātas profesionālās izglītības iestādes direktoru konkursa kārtībā pieņem darbā un atbrīvo no tā Izglītības un zinātnes ministrija vai attiecīgās nozares ministrija. Profesionālās izglītības iestādes direktora pilnvaras sākas ar darba līgumā noteikto darba attiecību nodibināšanas brīdi. Koledžas direktoru iecel amatā uz termiņu, kas nepārsniedz piecus gadus, un ne vairāk kā divas reizes attiecīgajā koledžā. Augstskolu koledžas direktoru konkursa kārtībā pieņem darbā un atbrīvo no tā augstskolas rektors” - sk. Profesionālās izglītības likuma 17.<sup>3</sup> panta otro-piekto daļu (LR Saeima, 1999).

Jāņem vērā, ka šobrīd aktuālais tiesiskais regulējums bija būtiski transformēts ar 2022. gada 15.septembrī Saeimā pieņemto likumu "Grozījumi Profesionālās izglītības likumā" (LR Saeima, 2022). Minēto Grozījumu anotācija (LR Saeima, 2021) akcentē, ka koledžu un koledžās īstenotās izglītības attīstība Latvijā ir notikusi profesionālās izglītības un augstākās izglītības reformu ietvarā. Koledžas ieņem īpašu nišu Latvijas izglītības sistēmas institucionālajā sistēmā, jo tās vienlaikus ir gan profesionālās izglītības iestādes, gan augstākās izglītības iestādes. Vēsturiski, saskaņā ar 2000. gadā veiktajiem grozījumiem, Augstskolu likumā koledžas ieguva augstākās izglītības iestāžu statusu, un to darbībai tika izvirzītas prasības, kas attiecināmas uz augstskolām. 2019.gadā Izglītības un zinātnes ministrija uzsāka augstskolu iekšējās pārvaldības reformu. Veicot izvērtējumu, tika secināts, ka koledžas ir veidotas un ir attīstījušās kā profesionālās izglītības iestādes un pēc būtības ir atbilstošas profesionālās izglītības iestādes tipam. Tādējādi 2022.gadā likumdevējs nolēma Profesionālās izglītības likumā iekļaut izmaiņas pastāvošajā tiesiskajā regulējumā attiecība uz koledžām, paredzot no Augstskolu likuma izslēgtās normas par koledžu kā institūciju darbību iekļaut Profesionālās izglītības likumā (LR Saeima, 2021).

Neskatoties uz minēto, Augstskolu likums (LR Saeima, 1995) joprojām turpina regulēt atsevišķus jautājumus, kas ir saistīti ar koledžu darbību – piemēram, jautājumus par koledžas akreditācijas definēšanu; personāla akadēmisko darbību “(personu var ievēlēt tikai vienā — profesora, asociētā profesora, docenta, lektora vai asistenta — akadēmiskajā amatā un tikai vienā augstskolā. Šādā akadēmiskajā amatā ievēlēta persona akadēmisko darbu citā

augstskolā vai koledžā var veikt, būdama viesprofesora, viesdocenta vai vieslektora amatā); par studējošu un absolventu reģistru (Datus studējošo un absolventu reģistram par augstākās izglītības programmās studējošajiem un absolventu studijās iegūtajiem grādiem un profesionālajām kvalifikācijām sniedz augstskolas un koledžas. Augstskolas rektors un koledžas direktors ir atbildīgs par studējošo un absolventu reģistram sniegto datu precizitāti un atbilstību īstenībai); par diploma reģistru (Diplomu reģistrā ieraksta ziņas par visiem augstākās izglītības diplomiem, kurus izsniedz Izglītības iestāžu reģistrā reģistrētās augstskolas, koledžas un ārvalstu augstskolu filiāles” - sk. Augstskolu likuma 46.<sup>1</sup> panta otro daļu (LR Saeima, 1995). “Diplomu reģistru kārtoti tam pilnvarota augstskolas vai koledžas amatpersona)” u.c.

Atbilstoši Augstskolu likuma 17.panta septītajai daļai, “par augstskolas rektoru var ievēlēt personu ar nevainojamu reputāciju un sasniegumiem zinātnē vai mākslās. Zinātnes universitātē, lietišķo zinātņu universitātē un lietišķo zinātņu augstskolā par rektoru var ievēlēt personu, kurai ir zinātnes doktora grāds. Mākslu un kultūras universitātē par rektoru var ievēlēt personu, kurai ir zinātnes vai profesionālais doktora grāds mākslās vai kura ir ievēlēta par profesoru mākslas jomā jebkurā Latvijas vai ārvalstu augstākās izglītības institūcijā. Savukārt privātpersonu dibinātas augstskolas rektora izraudzīšanas, ievēlēšanas, apstiprināšanas un atcelšanas kārtību nosaka augstskolas satversme”.

Veiktā analīze liecina, ka konceptuālajā normatīvi-tiesiskajā regulējumā (likumos, kas primāri regulē jautājumus, kas ir saistīti ar koledžas direktora amatu un augstskolu rektora amatu) nav iekļauta līderības prasība. Tomēr zīmīgi ir tas, ka līderības tēma ir implementēta profesionālās kompetences pilnveides programmā "Izglītības vadība" – “mērķtiecīga, uz rezultātu orientēta izglītības procesa organizācija, uz profesionālo sadarbību vērsta pedagoģiskā procesa īstenošana, līderība, finanšu prasmes, dokumentu pārvaldība, skolvadība, tai skaitā pārmaiņu vadība, izglītības kvalitātes monitorings izglītības iestādē, personālvadība” - Ministru kabineta 2018. gada 11. septembra noteikumu Nr. 569 "Noteikumi par pedagogiem nepieciešamo izglītību un profesionālo kvalifikāciju un pedagogu profesionālās kompetences pilnveides kārtību" 18.3.punkts (MK, 2018).

Analizējot 18 sludinājumus konkursos uz koledžas direktora amatu par laika posmu no 2008. līdz 2022.gadam, ir iegūti rezultāti, kas ir apkopoti 3. tabulā:

Iegūtie rezultāti liecina, ka nevienā no 18 sludinājumiem konkursos uz koledžas direktora amatu par laika posmu no 2008. līdz 2022.gadam nav atrodama prasība pēc līderības kā vadības kompetences. Analizējot 70 sludinājumus konkursos uz augstskolas rektora amatu par laika posmu no 2004. līdz 2023.gadam, prasība pēc vadības kompetences "līderība" ir atrodama tikai vienā no sludinājumiem, proti, sludinājumā ar kodu R10.

Abās sludinājumu kategorijās (K01-K18 un R01-R70), galvenokārt ir akcentētas prezentācijas, sadarbības un komunikācijas prasmes, vadības prasmes,

prasme argumentēt savu viedokli un pieņemt lēmumus, iniciatīva, prasmes darbā ar standarta biroja programmatūru.

3.tabula *Prasības pretendentiem - attiecībā uz prasmēm un spējām* (autoru veidota)  
 Table 3 *Requirements for applicants - regarding skills and abilities* (created by authors)

Sludinājuma kods pētījumā	PRASĪBAS PRETENDENTIEM/-ĒM: (attiecībā uz prasmēm un spējām)
K01	“- prezentācijas, sadarbības un komunikācijas prasmes - labas digitālās prasmes”
K02	“- prezentācijas, sadarbības un komunikācijas prasmes - labas digitālās prasmes, kā arī pieredze projektu vadībā tiks uzskatītas par priekšrocību”
K03	“- prezentācijas, sadarbības un komunikācijas prasmes”
K04	“- prezentācijas, sadarbības un komunikācijas prasmes”
K05	[...]
K06	“- stratēģiskās plānošanas, komunikācijas un sadarbības prasmes - darba organizācijas un vadības prasmes”
K07	“- laba stratēģiskā plānošana, komunikācijas un sadarbības prasmes - labas darba organizācijas un vadības prasmes”
K08	“- vadības prasmes - prasme argumentēt savu viedokli un pieņemt lēmumus - komunikācijas prasmes, sadarbības prasmes un iniciatīva - prasmes darbā ar standarta biroja programmatūru”
K09	“- prezentācijas, sadarbības un komunikācijas prasmes”
K10	“- vadības prasmes - prasme argumentēt savu viedokli un pieņemt lēmumus - komunikācijas prasmes, sadarbības prasmes un iniciatīva”
K11	“- vadības prasmes - prasme argumentēt savu viedokli un pieņemt lēmumus - komunikācijas prasmes, sadarbības prasmes un iniciatīva - prasmes darbā ar standarta biroja programmatūru”
K12	“- vadības prasmes - prasme argumentēt savu viedokli un pieņemt lēmumus - komunikācijas prasmes, sadarbības prasmes un iniciatīva - prasmes darbā ar standarta biroja programmatūru”
K13	[...]
K14	“- teicamas komunikācijas, sadarbības un prezentācijas prasmes - prasme strādāt ar standarta biroja programmatūru.”
K15	“- laba reputācija, atbildības sajūta un precizitāte, labas komunikācijas spējas, radoša pieeja darbam - teicama valsts valodas prasme, divu svešvalodu zināšanas”
K16	[...]
K17	“- prasmes darbā ar datoru - prasme argumentēt savu viedokli un pieņemt lēmumus - komunikācijas un sadarbības prasmes”
K18	“prasme strādāt ar standarta biroja programmatūru”



## **Secinājumi** **Conclusions**

Autori secina, ka efektivitātes nodrošināšana prasa no koledžas direktora un augstskolas rektora amata kandidātiem ne tikai attiecīgu izglītības līmeni un formālo kvalifikāciju, attiecīgu pieredzi un normatīvi tiesiskā regulējuma pārzināšanu, bet arī izteiktu līderības profilu apvienojumā ar spēju sadarboties ar cilvēkresursiem, ka arī nosvērtību krīžu situāciju pārvarēšanā.

Normatīvajos tiesību aktos, kas regulē jautājumus, kas ir saistīti ar koledžas direktora amatu un augstskolu rektora amatu nav iekļauta līderības prasība, kas norāda uz to, ka likumdevējs šobrīd neakcentē minēto aspektu kā obligāto. Vienlaikus, netiešas atsauces Ministru kabineta 2021. gada 22. jūnija rīkojumā Nr. 436 "Par Izglītības attīstības pamatnostādņem 2021.-2027.gadam" (MK, 2021) un Ministru kabineta 2018. gada 11. septembra noteikumos Nr. 569 "Noteikumi par pedagogiem nepieciešamo izglītību un profesionālo kvalifikāciju un pedagogu profesionālās kompetences pilnveides kārtību" (MK, 2018) apliecina, ka līderības aspekts tiek traktēts kā būtisks. Nevar izslēgt varbūtību, ka likumdevējs uzskata līderības prasību par pašsaprotamu vai arī paļaujas uz amatu konkursu organizētāju rīcības brīvību prasību formulēšanā. Tomēr prakse liecina, ka no 88 analizētajiem amatu konkursu sludinājumiem prasība pēc vadības kompetences "līderība" ir atrodama tikai vienā no sludinājumiem, kas norāda likumdevēja izvēlēta risinājuma nepietiekamību.

Lai arī atsevišķajos analizētajos sludinājumos ir akcentēta prasme pieņemt lēmumus gan arī vadības prasme kā tāda, arī šāda pieceja nenodrošina līderības konsekvētumu. Proti, iepriekšējā pieredze vadošajos amatos bieži vien tiek pielīdzināta vadīšanas prasmes un līderības esamībai. Tomēr, jāņem vērā, ka līderība un vadības prasme ir cieši saistīti termini, tomēr līderība ir konceptuāli saistīta ar pārmaiņām (ietekme ir vērsta uz vēlamo rezultātu sasniegšanu), bet vadība ir saistīta ar uzturēšanu (jeb vērsta uz pašreizējas organizatoriskās kārtības efektīvu un iedarbīgu uzturēšanu).

Augstskolu un koledžu īpaša vieta Latvijas izglītības institucionālajā sistēmā nosaka īpašas prasības minēto iestāžu vadītājiem koledžas, tajā skaitā aktualizē moderno līderības aspektu. Jebkurai izglītības iestādei ir jābūt pielāgotai mūsdienu Eiropas Savienības un pasaules izglītības vadības principiem, kas akcentē novitātes un inovācijas elementus. Vienlaikus, prakse liecina, ka Latvijas Republikas izglītības sistēma joprojām ir visai centralizēta, tāpēc minēto amatu ieņēmēji nevarēs ignorēt izglītības sistēmas vertikālo organizāciju. Attiecīgi, iesakņojušos priekšstatus par līderības nepieciešamību ir grūti mainīt, un tas prasa ne tikai laiku, bet arī informēšanu un atbalstu. Pats svarīgākais šajā ziņā ir politiskā apņemšanās, kuru var skaidri un nepārprotami manifestēt grozot normatīvus tiesību aktus.

Amatu konkursu sludinājumu prasības ir jāmodernizē un jāpielāgo mūsdienu prasībām – kā galīgo konkursa mērķi šiem amatiem atlasīt cienīgus un radošus līderus. Proti, raksta autori piedāvā normatīvi nostiprināt amata konkursa rīkotāju pienākumu iekļaut līderības prasību koledžas direktora un augstskolas rektora amata konkursu sludinājumos.

Visbeidzot, amatu konkursu rīkotājiem būtu jāparedz arī konsekvents kandidāta līderības pārbaudes mehānisms. Ja izglītība, pieredze, pat valodu zināšanas un datorprasmes ir salīdzinoši formalizētie kritēriji, kurus ir samērā viegli pārbaudīt, tad līderības pārbaude ir visai aktuāls izaicinājums, kurš prasa inovatīvas pieejas. Minētā jautājuma izpētei raksta autori var pievērsties nākotnē – tādā veidā jau veiktā pētījuma ierobežojumi paver ceļu turpmākiem pētniecības virzieniem, nostiprinot un akcentējot līderības lomu, jo tādā veidā tiek nodrošināta visas izglītības sistēmas stabilitāte, efektivitāte un kvalitāte.

### **Kopsavilkums** *Summary*

Ensuring efficiency requires from candidates for the post of college director and university rector not only an appropriate level of education and formal qualifications, relevant experience and familiarity with the regulatory and legal framework, but also a strong leadership profile combined with the ability to cooperate with human resources, as well as composure in overcoming crisis situations. Normative legal acts that regulate issues related to the position of college director and university rector do not include a leadership requirement, which indicates that the legislator does not currently emphasize the mentioned aspect as mandatory in Latvia. At the same time, indirect references confirm that the aspect of leadership is treated as essential. We cannot rule out the possibility that the legislator considers the leadership requirement to be self-evident or relies on the freedom of action of the organizers of the office competition in formulating the requirements. However, practice shows that out of the 88 analyzed job vacancies, the requirement for management competence "leadership" is found in only one of the advertisements, which indicates the inadequacy of the solution chosen by the legislator.

Although the individual analyzed advertisements emphasize the ability to make decisions as well as leadership skills as such, this approach also does not ensure leadership consistency. Namely, previous experience in managerial positions is often equated with the existence of management skills and leadership. It should be noted that leadership and management skills are closely related terms, however, leadership is conceptually related to change (influence is aimed at achieving desired results), while management is related to maintenance (i.e. focused on the effective and efficient maintenance of the current organizational order).

The requirements of job competition announcements must be modernized and adapted to modern requirements - as the ultimate goal of the competition is to select worthy and creative leaders for these positions. Namely, the authors of the article propose to legally strengthen the obligation of the organizers of the competition to include the leadership requirement in the competition announcements for the position of college director and university rector.

The organizers of job competitions should also provide for a consistent mechanism for testing the candidate's leadership. The authors of the article can focus on the research of the mentioned issue in the future - in this way, the limitations of the already conducted research pave the way for further research directions.

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# DOKTORANTA IDENTITĀTE JAUNĀ DOKTORANTŪRAS MODEĻA IEVIEŠANĀ LATVIJĀ

## *The Identity of the Doctoral Student in the Implementation of the new doctoral student model in Latvia*

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**Abstract.** *The article analyzes issues related to the introduction of the new doctoral study model in Latvia. The transition affects several dimensions - institutional, quality, funding, etc., while the identity of the doctoral student is of great importance. Qualitative scientific research is of interest not only to the doctoral student himself, but also to the university and the country as a whole. The authors of the article believe that the new identity of the doctoral student can be strengthened by emphasizing the understanding of his duties and responsibilities, including so that the results of the doctoral student's scientific research work are used, realized and contribute to the development of the country. economy (and not only).*

**Keywords:** *Doctoral Programs, Doctoral Students, Higher Education, Identity of Doctoral Students.*

### **Ievads**

#### ***Introduction***

2020. gada 25. jūnijā ar Ministru kabineta rīkojumu Nr. 345 “Par konceptuālo ziņojumu “Par jauna doktorantūras modeļa ieviešanu Latvijā” (LR Ministru kabinets, 2020) tika atbalstīts jauns doktorantūras modelis Latvijā, attiecīgi paverot ceļu doktora studiju modernizācijai, tostarp starpdisciplinārās doktorantūras izveidei, kā arī ļaujot uzlabot doktorantūras studiju un pētniecības kvalitāti (pētniecībā balstītās studijas), attiecīgi nodrošinot doktorantiem konkurētspējīgu atalgojumu studiju laikā. Šim ziņojumam sekoja apjomīgi grozījumi Augstskolu likumā (LR Saeima, 1995) un Zinātniskās darbības likumā (LR Saeima, 2005).

Konceptuālajā ziņojumā (LR Ministru kabinets, 2020) ietvertais risinājums paredz jaunu doktorantūras finansēšanas modeli, stiprinot pētniecības izcilību doktora studiju programmās (turpmāk – DSP) un sekmējot doktora grāda iegūšanu optimālā laikā (trīs līdz četros gados), jaunu doktora grāda piešķiršanas jeb promocijas procesu, kā arī citus priekšnosacījumus DSP īstenošanai, tostarp par augstskolas pētniecisko kapacitāti, doktorantūras skolu izveidi, DSP

licencēšanu un akreditāciju, DSP atbilstību Zalcburgas principiem un rekomendācijām (LR Ministru kabinets, 2020).

Pāreja uz jauno doktorantūras modeli skar vairākas DSP īstenošanas jomas – saturisko, organizatoriski - institucionālo, kvalitātes, finansējuma u.tml., faktiski izvirzot jaunas prasības doktorantūras personālam – mācībspēkiem, pētniekiem un, protams, doktorantiem. Vienlaikus, vērtējot jaunā doktorantūras modeļa stiprās un vājās puses, modeļa ieviešanas mērķa kontekstā jāvērtē doktoranta tiesības un pienākumi jaunajā doktorantūras modelī. Tas nozīmē, ka šī modeļa veiksmīgai īstenošanai ir nepieciešams motivēts doktorants, kurš apliecina sevi dažādās zinātniskajās iniciatīvās un projektos, ir ambiciozs un atvērts jaunām idejām un inovācijām, bet pats galvenais – skaidri izprot savu studiju jēgu un ir gatavs strādāt ar mērķi izstrādāt savu promocijas darbu programmas apgūšanas laikā.

Konceptuālajā ziņojumā (LR Ministru kabinets, 2020) ietekmi uz doktoranta tiesībām un pienākumiem atstāj gan studiju ilguma, gan finansēšanas modeļa maiņa, gan studiju procesa organizācijas maiņa. Augstvērtīgos zinātniskos pētījumos ir ieinteresēts ne tikai pats doktorants, bet arī augstākās izglītības iestāde un valsts kopumā, attiecīgi veicinot tautsaimniecības (un ne tikai) attīstību zinātniski pamatotās atziņās.

Jānorāda, ka pirmā starpdisciplinārā doktora studiju programma Latvijas Republikā, kas gandrīz pilnībā ir balstīta konceptuālā modeļa pamatprincipos un prasībās, ir izveidota Rīgas Stradiņa universitātē (Rīgas Stradiņa universitāte, 2021). Studiju programma “Sociālās zinātnes”, attiecīgi pārvarot doktora studiju programmas fragmentārismu un konsolidējot līdz šim esošās piecas doktora studiju programmas “Tiesību zinātne”, “Politikas zinātne”, “Socioloģija” un “Komunikācijas kultūra un multimediji”, “Vadībzinātne”, kas atbilst dažādiem akreditētajiem studiju virzieniem (Palkova, Kudeikina, Mihailovs, 2023), piedāvā jaunas iespējas un starpdisciplināru skatījumu jaunajiem zinātniekiem, ļaujot iesaistīties plaša (sa)darbības tīkla un iegūt dažādu nozaru pārstāvju skatījumu uz veiktajiem pētījumiem.

Pētījuma mērķis ir analizēt doktoranta identitāti jaunā modeļa sociālo zinātņu doktorantūrā, ietverot doktorantūras studiju būtiskākos elementus, ļaujot izprast, vai šobrīd doktorants ir atbilstīgs tām ekspektācijām, kuras ir sagaidāmās jaunā modeļa kontekstā.

Lai gan termins “identitāte” ir plaši interpretējams sociālo zinātņu pētniecības kontekstā, šajā rakstā ar to tiek saprasta doktoranta izpratne par savu sagaidāmo darbību, statusu, tiesībām, pienākumiem un atbildību doktorantūrā kontekstā ar jaunu doktorantūras modelī Latvijā.

Pētījumā tiks izmantotas vispārzinātniskās pētījuma metodes un tiesību normu interpretācijas metodes, analizējot tiesību aktus, politikas plānošanas dokumentus un teorijas avotus, kā arī daļēji strukturētā intervija, 2023. gada nogalē intervējot Rīgas Stradiņa universitātes Sociālo zinātņu doktorantūras

doktorantu, indukcijas – dedukcijas metode, izdarot secinājumus un izsakot priekšlikumus.

### **Jaunie izaicinājumi zinātnē** *New challenges in science*

Inovācijas ir viens no valsts tautsaimniecības ilgtspējīgas attīstības pamatiem. Šobrīd pasaule piedzīvo globālas pārmaiņas, kas saistītas gan ar klimata un vides pārmaiņām, gan ar sociāli – ekonomiska rakstura transformācijām. M. Grīviņš norādījis, ka pēdējos gados tika novērota virkne dažādu kritisku izaicinājumu un inovāciju ienākšana, kas ir transformējuši veidu, kā mēs domājam un kā mēs darbojamies pasaulē (Grīviņš, 2023). Vienlaikus ar jaunām tehnoloģijām, transformētām sociāli – tiesiskajām attiecībām, rodas nepieciešamība pēc citādas pieejas inovāciju radīšanā un ieviešanā. Pēc tādas pieejas, kas ļauj operatīvi reaģēt uz vides izmaiņām un paredz problēmu starpdisciplināru risinājumu, veicinot ekonomisko, politisko, tiesisko, sociālo u.c. izaugsmi.

Zinātniskajā literatūrā ir izteikts viedoklis, ka pastāv ilgtermiņa cēloņsakarības starp ekonomisko izaugsmi un izmantotajām inovācijām, vienlaikus atzīstot, ka dažādās valstīs var būt dažādas stratēģijas, kurās jāņem vērā valsts perspektīvas un attīstības stratēģijas (Sarangi, K., Rudra, P., Tamal, N. & all, 2022). Inovatīva un ecoefektīva ekonomika ir viens no Latvijas ilgtspējīgas attīstības pīlāriem. Latvijas ilgtspējīgas attīstības stratēģijā inovācijām pievērsta īpaša nozīme, norādot, ka “mūsdienās inovācija vairs netiek attiecināta tikai uz augstām tehnoloģijām, bet arī uz jaunu ideju radīšanu un ieviešanu ikvienā darbības jomā, tādēļ valstu konkurētspējai arvien būtiskāk ir iesaistīt jaunrades procesā pēc iespējas lielāku iedzīvotāju skaitu” (LR Saeima, 2010). Lai radītu un ieviestu inovācijas, būtiska nozīme ir zinātniekiem, jo, neraugoties uz sabiedrības un ikviena tās locekļa iespēju iesaistīties inovatīvu produktu radīšanā, tieši zinātnieki ir tie, kas sniedz pienesumu, izmantojot zinātniski pamatotas metodes, darbojoties sistēmiski un mērķtiecīgi.

Ē.Sułkowski un J.Dziedzic izteikuši viedokli, ka pētnieku, zinātnieku profesionālo ceļu, veicot pētniecību, raksturo lēmumu daudzdimensionalitāte un šo lēmumu iekšējā struktūra jeb zinātniski pamatots izpētes ceļš. (Sułkowski, Dziedzic, 2021), tādējādi nodrošinot augstvērtīgu produktu radīšanu.

Zinātnes nozīmi atspoguļo arī tiesiskais regulējums. Tā, no Zinātniskās darbības likuma 2. panta izriet, ka zinātne ir īpaši svarīgs sabiedrības attīstības faktors, un valsts uzņemas rūpes par zinātne (LR Saeima, 2005). Zinātnes kā termina skaidrojums sniegts Zinātniskās darbības likuma 1. panta 3. punktā – zinātne ir intelektuālās darbības sfēra, kurā ar teorētiskām vai eksperimentālām metodēm tiek iegūtas un apkopotas zināšanas par dabā un sabiedrībā pastāvošajām likumsakarībām (LR Saeima, 2005). Izpratne par zinātnes vērtību



ikvienam var būt sava, vienlaikus apzinoties, ka “zinātnes pamatuzdevums ir pasaules parādību un procesu izzināšana un jaunu patiesību atklāšana” (Latvijas Zinātņu akadēmija, 1997).

Izpratne par zinātnes vērtību ikvienam var būt sava. Kādam zinātne ir nozīmīga ar to, ka tiek radīti produkti sadzīves vajadzību apmierināšanai, citam – ka tiek radīti valsts aizsardzības spēju stiprināšanai augsti tehnoloģiski produkti. Izsmelīgi zinātnes nozīmi ir raksturojusi M. DiChristina, norādot, ka “zinātne nav faktu kopums vai iegūta gudrība, kas ir nodota. Tā ir sistēma jauninājumiem un attīstībai — un cilvēces labākais izgudrojums, lai meklētu patiesību un izpratni par to, kā pasaule darbojas. Tas var veicināt mūsu kā nācijas ekonomisko izaugsmi un veidot ceļu mūsu jauniešiem konkurētspējīgā globālajā tirgū. Un zinātne var iedarbināt mūsu iztēli. Tātad fundamentālie pētījumi palīdz uzlabot mūsu labklājību, valsts ekonomisko izaugsmi un darba vietu radīšanu” (DiChristina, 2014).

Zinātne tas ir izaugsmes ceļš, valsts stabilitātes un attīstības pamats, ikviena sabiedrības locekļa labklājības garants. Labklājība ir atvērts juridisks termins, bet tomēr kopīgais ir tas, ka ar labklājību jāsaprot gan materiālā, gan nemateriālā labklājība, gan dažādi citi dzīves kvalitātes apstākļi (piemēram, iespēja iegūt izglītību, iespēja saņemt veselības aprūpes pakalpojumus, iespēja izpaust savu identitāti, radošas un zinātniskas brīvības izpausmes iespējas, labbūtība u.tml.). Kā norāda Latvijas Republikas Satversmes tiesa: “sabiedrības labklājība, bez šaubām, visupirms aptver sabiedrības kopējās materiālās labklājības aspektus, pie kuriem pieder dažādi pasākumi, kas vērsti uz sabiedrības kopējo materiālo labumu palielināšanu vai pārdalīšanu starp sabiedrības locekļiem”. (Latvijas Republikas Satversmes tiesa, 2007). Tomēr arī izpratne par labklājību, kritērijiem tās noteikšanai un tās sasniegšanas ceļiem laika gaitā ir transformējusies. Tā, D. Plepa norāda, ka “Laika gaitā ir mainījies priekšstats par to, kas ir galvenais nācijas labklājības pamats, proti, lauksaimniecība vai rūpniecība, vai tomēr zinātne un inovācijas. Laika gaitā mainījusies arī izpratne par to, kā nomērīt labklājību. 20. gadsimtā labklājības līmeni valstī raksturoja iekšzemes kopprodukts (IKP). Kopš 2006.gada tiek mērīts pasaules valstu labklājības indekss (*The Legatum Prosperity Index*), kas ietver tādus elementus kā investīciju vide, uzņēmējdarbības nosacījumi, piekļuve tirgum un infrastruktūrai, ekonomikas kvalitāte, izglītība, veselība, dzīves apstākļi, dabas vide, drošība un drošums, pārvaldība, personiskā brīvība un sociālais kapitāls. Savukārt kopš 2012. gada tiek veidots laimes indekss (*World Happiness Index*), analizējot IKP uz iedzīvotāju, sociālo atbalstu, dzīvildzi, izvēles brīvību, dāsnumu un korupcijas uztveri” (Plepa, 2023).

Neraugoties uz to, ka labklājība ir subjektīvi vērtējama kategorija, tomēr ir iespējams tās raksturošanai definēt vispārīgus kritērijus. Vēl 2001. gadā ar labklājības valsti tika saprasta tāda valsts, kas ir apņēmusies nodrošināt saviem pilsoņiem pamata ekonomisko drošību, aizsargājot tos no tirgus riskiem, kas saistīti ar vecumu, bezdarbu, nelaimes gadījumiem un slimībām. (Weir, 2001).

Mūsdienās labklājības valsts ir pāraugusi sociālās labklājības, sociālā nodrošinājuma robežas. Globalizācija un tehnoloģiju attīstība, klimata pārmaiņas un ģimenes sociālā transformācija, mainīgā pasaules drošība, mākslīgā intelekta attīstība – tie ir tikai daži no izaicinājumiem, ar kuriem mūsdienās jāsaskaras, prognozējot sabiedrības tālākās attīstības virzienus, modelējot dažādus attīstības scenārijus.

Kā iepriekš secināts, tad zinātne ir labklājību veidojošais dzinējspēks. Mainoties faktiskajiem apstākļiem, mainās arī tās prasības, kādas tiek izvirzītas zinātnei un zinātniskās darbības veicējiem – zinātniekiem, kā arī tiem, kuri vēlas kļūt par zinātniekiem, tostarp doktorantiem.

Zinātne mainās līdz ar sabiedrību. Starpdisciplināritāte ir jēdziens, kas raksturo mūsdienu vajadzības zinātnē. To apliecina Latvijas Republikas Ministru kabineta 2021. gada 22. jūnija rīkojumā Nr. 463 “Par izglītības attīstības pamatnostādņem 2021. – 2027. gadam” norādītais: “Mūsdienās ir cieši saistīti vides, veselības, sabiedrības attīstības procesi, ekonomikas un citu nozaru jautājumi, un to pilnvērtīgai izpratnei un risināšanai ir nepieciešama starpdisciplināra un cilvēku vajadzībās, tehnoloģiskajās iespējās un vērtību radošos risinājumos (dizaina domāšanā) balstīta pieeja. Starpdisciplināritāte ir būtisks resurss inovācijām” (LR Ministru kabinets, 2021). Tāpat par izaicinājumiem zinātnē var uzskatīt gan datu jautājumus, jeb datu izmantošanas, tālāk nodošanas problemātiku, gan tehnoloģiju attīstību, kas savukārt rada jaunas zinātnes jomas un izvirza jaunas prasības pētniekiem, gan pētījumu pasūtītājiem, kas ir spiesti pielāgoties mainīgajai pētniecības videi.

Vienlaikus jaunas prasības, jauni kvalitātes kritēriji tiek izvirzīti ne tikai zinātnei, bet arī zinātniekiem, kuru sagatavošana sākas doktorantūras studijās.

### **Doktorantūras studijām izvirzāmās prasības** *Requirements for doctoral studies*

Zinātniskā darbība uzskatāma par darbību cilvēku labā, tāpēc tās kvalitātei izvirzāmas visaugstākās prasības. Mūsdienu prasībām atbilstošas doktorantūras studijas ir augstskolu viena no prioritātēm. “Doktora studiju programmas “Sociālās zinātnes” nozaru apvienošana starpdisciplinārā perspektīvā sniedz iespēju topošajiem pētniekiem, zinātnisko iestāžu vadītājiem, valsts attīstības un politikas plānošanā iesaistītajiem ekspertiem attīstīt jaunu pieeju zinātnisko rezultātu ietekmes novērtēšanā un izplatīšanā” (Palkova, Kudeikina, Mihailovs, 2023). Starpdisciplināritāte un citas izvirzāmās prasības nav abstrakti termini, tām ir noteikts tiesiskais ietvars un tās rezultējas konkrētās zināšanās, prasmēs un kompetencē, kas sagaidāma no doktora studiju absolventa.

Latvijas Republikas Ministru kabineta 2017. gada 13. jūnija noteikumi Nr. 322 “Noteikumi par Latvijas izglītības klasifikāciju” (LR Ministru kabinets, 2017) noteic, ka doktorantūrai atbilstošā 8. Latvijas kvalifikācijas ietvarstruktūras

(turpmāk – LKI) līmeņa absolvents zināšanu jomā spēj parādīt, ka pārzina un izprot aktuālākās zinātniskās teorijas un atziņas, pārvalda pētniecības metodoloģiju un mūsdienu pētniecības metodes attiecīgajā zinātnes nozarē vai profesionālajā jomā un dažādu jomu saskarē”. Vienlaikus ir iezīmētas arī prasmes, proti, doktorantam jāspēj: patstāvīgi izvērtēt un izvēlēties zinātniskiem pētījumiem vai mākslinieciskai jaunradei atbilstošas metodes, ir jāveic ieguldījumu zināšanu robežu paplašināšanā vai jādod jaunu izpratni esošām zināšanām un to lietošanai praksē, īstenojot mākslinieciskās jaunrades darbu mākslinieciskās darbības jomās vai būtiska apjoma oriģinālu pētījumu, no kura daļa ir starptautiski citējama publikāciju līmenī. Vienlaikus, tiek prasīts spēt gan mutiski, gan rakstiski komunicēt par savu zinātniskās darbības jomu (savu nozari) ar plašām zinātniskām aprindām un sabiedrību kopumā un īstenot starptautiskas nozīmes mākslinieciskās jaunrades projektus.

Attiecīgo programmu absolventiem jāspēj patstāvīgi paaugstināt savu zinātnisko kvalifikāciju, īstenot zinātniskus projektus, gūstot zinātnes nozares starptautiskiem kritērijiem atbilstošus sasniegumus, vadīt pētnieciskus vai attīstības uzdevumus uzņēmumos, iestādēs un organizācijās, kur nepieciešamas plašas pētnieciskas zināšanas un prasmes, attīstīt jaunrades prasmes u.c. (LR Ministru kabinets, 2017). Līdz ar to ir redzams, ka caur zināšanu un prasmju caurviju no doktoranta sagaidāmas inovācijas, jaunu ideju, jaunu produktu radīšana, kas kalpotu sabiedrības vajadzību apmierināšanai. Minētais tieši korespondē ar doktorantūras pamatuzdevumiem, faktiski prasot nodrošinot iespēju attīstīt plašu skatījumu konkrēti izvēlēta promocijas darba temata kontekstā.

Jāpiekrīt jau 2012. gadā izteiktajam viedoklim, ka “Pētniecībā izmaiņas sociālekonomiskā un politiskā vidē rada pieaugošu nepieciešamību aktuālo jautājumu izpētē iesaistīt vairāku disciplīnu un specialitāšu ekspertus un īstenot starpdisciplināra rakstura pētījumus, bet augstākajā izglītībā – rast jaunas pieejas, kas var studentiem sniegt specifiskas zināšanas, plašu redzesloku un profesionālam darbam nepieciešamas prasmes un iemaņas.” (Medne, Muravska, 2012). Lai izmaiņas nenotiktu izmaiņu pēc, ir nepieciešama gan horizontāla, gan vertikāla sadarbība starp politikas plānotājiem, augstskolā, un, protams, pašiem doktorantiem.

Kādas īpašības raksturo doktorantu jeb kāds ir mūsdienu doktoranta portrets? Rīgas Stradiņa universitātes doktora studiju programmas 2. studiju gada doktorants 2024. gada 5. janvārī intervijā norāda, ka viņa motivācija studēt doktorantūrā ir saistīta ar viņa personiskajām ambīcijām, no studijām viņš sagaida iespēju paplašināt redzesloku, iegūt zināšanas, kas ļautu pievērsties docēšanas darbam, jo doktora zinātnes grāds jurisprudences profesijās nedod nekādas priekšrocības amatu konkursos. Doktorants norāda, ka pie promocijas darba strādā neregulāri, sakarā ar to, ka ir nodarbināts uz pilnu slodzi. Doktorantūra ir kā hobijs, brīvā laika pavadīšana. Lai nopietni pievērstos pētījumam, būtu jābūt

brīvam laikam, iespējai veltīt savu laiku tikai un vienīgi doktorantūrai, bet tad par to būtu jāmaksā vai jābūt iespējai strādāt universitātē. Prioritāte ir darbs, doktorantūra ir savu ambīciju apmierināšana, bet tā nenes ienākumus no kā varētu dzīvot, līdz ar to tai tiek veltīts laiks tikai pēc pamatpienākumu izpildes.

Lai arī kopumā doktorantūras studijas novērtētas pozitīvi, apzinoties to vērtību, tomēr bez ievēribas nevar atstāt satraucošu faktu, proti, studiju uztveršanu kā hobiju, kā papildu nodarbi. Hobija līmenī nav iespējama ilgtermiņa zinātniskā darbība, politiski iecerētā “atdeve uz pilnu slodzi”, kas nestu regulārus un ilgspējīgus zinātniskās darbības rezultātus.

Jāuzsver, ka normatīvajā regulējumā šobrīd nav noteikti doktorantu pienākumi un tiesības, kas zināmā mērā ļauj secināt, ka politikas plānotāji un īstenotāji pieļauj studiju doktorantūrā uztvert kā hobiju / papildu nodarbi jeb nodarbošanos, kas ir pakārtota doktoranta pamata darbībai, darbam profesijā. Līdz ar to faktiskā situācija, kā arī doktorantu vērtējums par doktorantūras studijām un iespējām, vismaz sociālajās zinātnēs, atšķiras no tām politiskajām iecerēm, kuras tika mēģināts īstenot, ieviešot jaunu doktorantūras modeli.

Raksta autori uzskata, ka, ievērojot sagaidāmos no doktorantiem ieguldījumus zinātnes attīstībā, tiesiskajā regulējumā būtu jāparedz doktorantu tiesības un pienākumi, kā arī atbilstīgas garantijas, attiecīgi samērojot ieceres, gaidas un plānotos rezultātus. Turklāt Augstskolu likuma 50. panta pirmā daļa, kas nosaka studējošā tiesības un pienākumus (LR Saeima, 1995), tikai daļēji ir attiecināma uz doktorantiem, jo minētā likuma norma neregulē uz doktorantu attiecināmo zinātnisko darbību un saistības tās sakarā.

Kopumā doktorantūras studijas ir pārejas posms, sintēze starp izglītību un pētniecību, kuras galvenais mērķis ir radīt jaunas zināšanas, tātad ne tikai esošo zināšanu ekspozīcija, bet spēja radīt jaunas atziņas, sagatavojot augstas raudzes speciālistu. Tieši šie pienākumi būtu jāatspoguļo tiesiskajā regulējumā, vienlaikus attīstot doktorantu motivācijas programmu, kas būtu regulēti kā doktorantu tiesības. Minētais samērojas ar jaunu doktorantu identitāti, izprotot savas tiesības, pienākumus, atbildību, kā arī to, kas no doktoranta patiesi tiek sagaidīts mūsdienīgajā doktorantūrā.

### **Secinājumi** **Conclusions**

Jaunā modeļa doktorantūras īstenošana ļauj apzināt tajā studējošo doktorantu identitāti, izgaismojot arī potenciālās problēmas:

- 1) Normatīvajā līmenī – jāprecizē doktoranta tiesības un pienākumi, kā arī atbildība studiju procesā (tostarp par promocijas darba izstrādi), vienlaikus risinot jautājumu par atbilstīgām sociālām (bet ne tikai) garantijām, lai studijas doktorantūrā nebūt īstenojamās kā tikai hobijs vai papildu nodarbe.

- 2) Zinātnes politikas līmenī – ir jāuzsāk diskusija un jāveido risinājumi motivācijas un atbalsta programmai, lai sekmētu doktorantu skaita pieaugumu, kā arī jāpaplašina iespēja doktorantiem iesaistīties dažādos pētījumu projektos, saņemot atbalstu pētījumu atziņu publiskošanai, t.sk. starptautisko atzītajos izdevumos, attīstot zinātnes komunikāciju un nozaru / darba tirgus un zinātnes sadarbību. Minētais ir tiešs politika veidotāju, primāri Izglītības un zinātnes ministrijas uzdevums, vienlaikus aktīvi iesaistoties augstskolām, īpaši zinātniskās darbības un doktorantūras vadītājiem.
- 3) Zinātniskās pētniecības un studiju (izglītības) līmenī – nostiprināma doktoranta jauna identitāte, uzsverot izpratni par savām saistībām un atbildīgumu, tostarp ka doktoranta zinātniski pētnieciskā darba rezultāti tiek izmantoti, realizēti un sniedz ieguldījumu tautsaimniecības (un ne tikai) attīstībā.

Līdztekus minētajām, ievērojot zinātnes politikas prioritātes, ir attīstāmi un atbalstāmi ne tikai doktorantu pētījumi, bet arī pētījumi par doktorantiem, iegūstot skaidru izpratni, kādi ir Latvijas doktoranti, kādas ir viņu vajadzības, kāds atbalsts ir nepieciešams, vai doktoranti apzinās / izprot savu statusu, atbildību, vai veidojas doktorantu profesionālā identitāte u.tml.

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# SKOLAS BIBLIOTĒKAS POTENCIĀLS SKOLĒNU PAŠVADĪTAS MĀCĪŠANĀS VEICINĀŠANAI *The Potential Of The School Library To Promote 'students' Self-Directed Learning*

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**Abstract:** *Motivating students to read more is becoming increasingly important nowadays. The ability to understand the meaning of a text, to analyse, critically evaluate and verify the information and facts, as well as formulate one's own opinion - this is a skill that is vital for modern people living in the 21st century - the century of fake news. The latest PISA 2022 study shows that average reading performance in Latvia has fallen in comparison to 2018 results. The average reading achievement of pupils of Latvia has been falling every year since 2012. The challenge for schools is to use their internal resources to stimulate pupils' interest in reading in order to break this trend. One of the school's internal resources is a library. The school library has an important role to play in motivating pupils to read and to learn. It is an environment that encourages and supports reading and self-directed learning. The aim of this publication is to describe possibilities of raising reading interest and self-directed learning opportunities in school library.*

**Keywords:** *interest in reading, librarian, reading, school library, self-directed learning, students.*

## Ievads Introduction

Mūsdienās kļūst arvien aktuālāk motivēt skolēnus vairāk pašvadīti lasīt, izprast, analizēt, kritiski izvērtēt izlasīto, pārbaudīt tajā ietverto informāciju un faktus, kā arī formulēt savu viedokli. Dažādu informācijas apmaiņas tehnoloģiju attīstība ir radījusi informācijas plūsmas nepārtrauktību, kad ik brīdi jāpieņem lēmums, kam ticēt, kam nē.

Attīstot skolēnos kritiskās domāšanas prasmes, svarīga ir pašvadītas mācīšanās kompetences izkopšana. Tas ir process, kurā skolēns spēj izmantot domāšanas, emocionālo procesu un uzvedības regulēšanas rīkus, lai sistemātiski orientētu sevi uz personisko mācību mērķu sasniegšanu, kas noderēs arī nākotnē kā pieaugušajam (Zimmerman & Schunk, 2011).

Liela loma skolēnu izglītošanā un audzināšanā ir videi. Intereses par lasīšanu veicināšanā, attieksmju, uzvedības veidošanā nenovērtēts resurss ir skolu bibliotēkas. Bibliotēku likums nosaka, ka bibliotēka ir izglītojoša, informatīva un kultūras institūcija (Latvijas Republikas Saeima, 1998). Tā ir cilvēku radīta kultūrvide, kurā tiek koptas lietas, prasmes, sabiedriskās normas u.c. (Kūle & Kūlis, 1996). Svarīgi, lai skolēns apzinās sevi kā vides, šai gadījumā bibliotēkas, sastāvdaļu, ka viņš šeit ir gaidīts un atbalstīts (Zvirbule, 2004).

Lielu daļu sava laika skolēns pavada skolā. Tātad arī skolā pavadītais laiks ietekmē skolēna attieksmes, motivāciju kaut ko darīt, iemācīties. Skola kļūst par mācīšanās organizāciju, pastāvīgi pielāgojas jauniem apstākļiem, kurā visas iesaistītās puses sadarbojas, lai sasniegtu kopīgu mērķi, kas vērsts uz skolēnu izaugsmi (Skola2030, n. d.). Skolas bibliotēka ir daļa no skolas, tātad tai ir būtiska nozīme jauniešu attieksmes un uzvedības veidošanā. Skolas bibliotēka ir svarīga izglītības sistēmas sastāvdaļa, kas palīdz sasniegt labākus izglītības rezultātus (Wojciechowska, 2022).

Būtiska kļūst arī skolas bibliotēkas sadarbība ar vecākiem. Nenovērtējama loma skolēna lasītprasmes pilnveidē, lasīšanas ieradumu veidošanā ir vecākiem. Vecāks kā paraugs skolēnam (Braše, 2010; Šteinberga, 2013). Tieši vecāks var sekmēt to, ka lasīšana un bibliotēkas apmeklējums kļūst par paradumu, kas ir īpaši nozīmīga agrā bērnībā (Špona, 2001; Goulmens, 2001). Svarīgi, ka vecāki priecājas un izrāda interesi par bērna sasniegumiem, kas būs kā ārējā motivācija, lai bērns attīstītu iekšējo motivāciju, prieku par saviem panākumiem, patstāvību, ieinteresētību darīt un uzzināt vairāk (Rutka, 2012).

Publikācijas mērķis ir apkopot teorētiskās atziņas, aktualizējot pētījumus par skolas bibliotēkas iespējām veicināt skolēnu pašvadītu mācīšanos. Veikt empīrisko izpēti par skolēnu pieredzi saistībā ar skolas bibliotēku. Pētījumā izmantotās metodes: pedagoģiskās un psiholoģiskās literatūras analīze, lai apkopotu teorētiskās atziņas, kā arī empīriskās izpētes metodes: skolēnu aptaujas, kvantitatīvās datu apstrādes un analīzes metodes (datu grafiska attēlošana, datu analīze).

### **Skolas bibliotēkas potenciāla teorētiskie aspekti** **Theoretical aspects of school library potential**

Publikācijas autoru novērojumi liecina, ka lasīšana, lasītā izprašana, analizēšana, kritiska izvērtēšana, ietvertā informācijas un faktu pārbaudīšana, kā arī sava viedokļa formulēšana ir pašvadīts process. Latvijas skolēnu vidējie sasniegumi lasīšanā kopš 2012.gada ar katru gadu krītas, par ko liecina arī jaunākais PISA 2022 pētījums (OECD, 2023). Arī Geske un Grīnfelds akcentē, ka tieši 5.–9. klasē notiek straujš intereses par lasīšanu kritums (Geske, Grīnfelds u.c., 2020).



Lasītprasme ir neatņemama sastāvdaļa visā mācību procesā. Vāja lasītprasme ierobežo skolēna izvēles. Ja ir grūtības ar lasītprasmi, viņš nevar piedalīties citos domāšanas vingrinājumos, tādējādi tiek kavēta arī tādu priekšmetu apgūšana un izpratne kā dabaszinātnes, tehnoloģijas, inženierzinātnes un matemātika (Ozola & Kivleniece, 2023). Tie ir mācību priekšmeti, kas prasa augstāku domāšanas līmeni. Ja skolēns neizprot, neuztver informāciju daiļliteratūras tekstā, tad tas var būtiski traucēt zinātniska rakstura tekstu uztveri.

Mācīšanās procesā svarīga loma ir radošumam, kad skolēns pedagoga vadībā pats apzinīgi iesaistās jaunu zināšanu apgūvē, radošās darbībās. To var veicināt gan ārēji, gan iekšēji motivējošie faktori. Ārējā motivācija ietver summātīvo vērtējumu, uzslavas u.c., savukārt iekšējā motivācija – paša skolēna tiešu ieinteresētību mācību rezultātu sasniegšanā. Labākus rezultātus mācību procesā nodrošina iekšējā motivācija, kad mācību procesā ir aktivizēta skolēna zinātkāre, interese utt. (Maļicka, 2004).

Iekšējā motivācija ir cieši saistīta ar emocijām. Caur emocijām skolēns pauž savu attieksmi pret apkārtējo pasauli. Attīstot skolēnos emocionālo inteliģenci, t. i., savu emociju atpazīšanu, var atvieglot saskarsmi dažādās situācijās, arī mācību procesā. Pamatemocijas, kas veicina mācīšanās motivāciju, ir interese, izbrīns un prieks (Šteinberga, 2013). Emociju iespaidā tiek izvēlēts rīcības modelis, kas pievērš uzmanību iepriekšējai pieredzei. Nereti emocijām ir lielāka nozīme par prāta spriedumiem (Goulmens, 2001).

Lai pašvadītas mācīšanās process būtu sekmīgs, pašam skolēnam tajā ir jāiesaistās – koncentrēšanās un iesaistīšanās mācību procesā, savas uzvedības un emocionālā stāvokļa regulēšana, pašdisciplīna, pašanalīze (Zimmerman, 2001). Pašvadīta mācīšanās procesā svarīga ir arī ārējā vide, lai tā būtu mācīšanos veicinoša un emocionāli pozitīva (Alwadaeen & Piller, 2022).

Publikācijas autores uzskata, ka skolas bibliotēkā skolēniem ir iespēja pašvadīti mācīties, izmantojot daudzveidīgus resursus. Piemēram, sadarbojoties ar dažādu mācību priekšmetu skolotājiem, skolas bibliotēka ir vieta, kur mācīties informācijpratību caur pētniecību (Kuhltha, 2010). Pastāv arī saikne starp mācību vidi skolas bibliotēkā un skolēnu sasniegumiem. Īpaši ir jāakcentē skolas bibliotēkas sniegtās iespējas mācīšanās vides radīšanai pētniecības jomā dabaszinātnēs (Schultz-Jones & Ledbetter, 2021).

Ņemot vērā tādus 21.gadsimta izaicinājumus kā tehnoloģiju attīstību, informācijas pārbagātību u.c., skolas bibliotekārs kļūst par skolēna palīgu orientēties informācijas klāstā, pārejot no mācīšanas, kā izmantot tehnoloģiju rīkus, uz mācīšanu, kā tehnoloģijas izmantot radošumam un jēgai. ASV veiktais pētījums “Iepazīsti kodēšanu, izmantojot galda spēles un to digitālās versijas sākumskolas klasēs un skolu bibliotēkās” (angļu: “Introducing coding through tabletop board games and their digital instantiations across elementary classrooms and school libraries”) atklāj bibliotēkas potenciālu mācīšanās vides radīšanai skolu bibliotēkās, jo pētījuma mērķis – skolēnu zināšanu par skaitļošanu un

kodēšanu padziļināšana, tika sasniegts (Lee, Poole, Clarke-Midura, Recker, & Rasmussen, 2020).

Lai arī bibliotēkas kļūst par 21.gadsimta informācijas centriem, tām primāri ir interese lasīt veicināšanas funkcija. Taču arī ir jāatzīst, ka lasītprasmes veicināšana ir komandas darbs, kurā iesaistās gan vecāki, gan skolotāji, gan arī, skolas bibliotekārs. Lasīšanas process ir neprognozējams – to nevar ne uzspiest, ne ieplānot. Skolas bibliotēka kļūst par vietu, kur skolēnam ir brīva izvēle, ko lasīt, kā arī viņš saskaras ar vidi, kurā tiek respektēta viņa izvēle, kurā pieaugušie un citi lasīt ieinteresēti vienaudži rāda priekšzīmi (Pieper, 2017). Taču ir jāatzīst arī, ka interese par lasīšanu rodas, ja rokās nonāk īstā grāmata (Līsmans, 2022).

21.gadsimts ir tehnoloģiju attīstības gadsimts. Informācijas saņemšanai, apmaiņai tiek izmantoti digitālie rīki. Digitalizācijas process ir skāris arī bibliotēkas. Bieži skolēni lasa grāmatas arī elektroniskā formātā. 2022. un 2023.gadā kādā no Liepājas vispārizglītojošajām skolām tika aptaujāti skolēni no 7. līdz 9. klasei, lai noskaidrotu priekšnoteikumus intereses par lasīšanu sekmēšanai, kā arī analizētu iespējamus šķēršļus lasītprasmes attīstīšanai. Tika secināts, ka skolēni, kam patīk lasīt papīra formātā, vairāk izjūt aizrautību par lasīšanu nekā skolēni, kas lasa grāmatas elektroniskā formātā (Laškova, Ročāne, 2023). Tādējādi ir jāakcentē, ka bibliotēkas kā fiziskas grāmatu krātuves nav apdraudētas.

Skolu bibliotēkas veicina skolēnu pašvadītu mācīšanos, kā arī veicina lasīšanas paradumus un māca viņiem izmantot zināšanu bāzi un attīstīt savas aizraušanos visā izglītības laikā.

### **Skolas bibliotēkas potenciāla empīriskā izpēte** **Empirical research on the potential of the school library**

Pētījumā tika izvēlēta datu ieguves metode – aptauja, kas norisinājās pētījuma bāzes skolā 2023.gada janvārī ar mērķi veikt skolēnu pieredzes par skolas bibliotēku empīrisko izpēti, kā arī noskaidrot skolu bibliotēku potenciālu skolēnu pašvadītas mācīšanās veicināšanā. Kopumā uz aptaujas jautājumiem atbildēja 208 respondenti - skolēni no 5. un 6. klases. Respondentiem-skolēniem tika lūgts novērtēt apgalvojumus un atbildēt uz jautājumiem saistībā ar lasīšanas un bibliotēkas apmeklējuma pieredzi. Apgalvojumus novērtēja ar *jā, drīzāk jā, daļēji, drīzāk nē, nē*.

Novērtējot apgalvojumu *Man patīk lasīt grāmatas*, tikai 13,94 % no visiem respondentiem pārliecinoši atzīmēja, ka patīk lasīt grāmatas. Savukārt 16,35% norādīja, ka nepatīk lasīt grāmatas. Lielākā daļa respondentu (46,16%) norādīja, ka patika lasīt grāmatas ir daļēja, kas liecina par nepieciešamību interese par lasīšanu veicināšanai (sk. 1.tab.).

Ņemot vērā skolēnu patiku vai nepatiku lasīt grāmatas, svarīgi bija noskaidrot viņu paradumus apmeklēt skolas bibliotēku. 65% respondentu, kuru

vērtējums pie apgalvojuma *Man patīk lasīt grāmatas bija jā vai drīzāk jā*, norādīja ka regulāri apmeklē skolas bibliotēku. Taču skolēnu vidū, kuri šo apgalvojumu novērtēja ar *nē* un *drīzāk nē*, tikai 19,23% respondentu norādīja, ka regulāri apmeklē skolas bibliotēku, pārējie neapmeklē, kas atklāj skolas bibliotēkas kā lasīšanu veicinošas vides potenciālu (sk. 1.tab.).

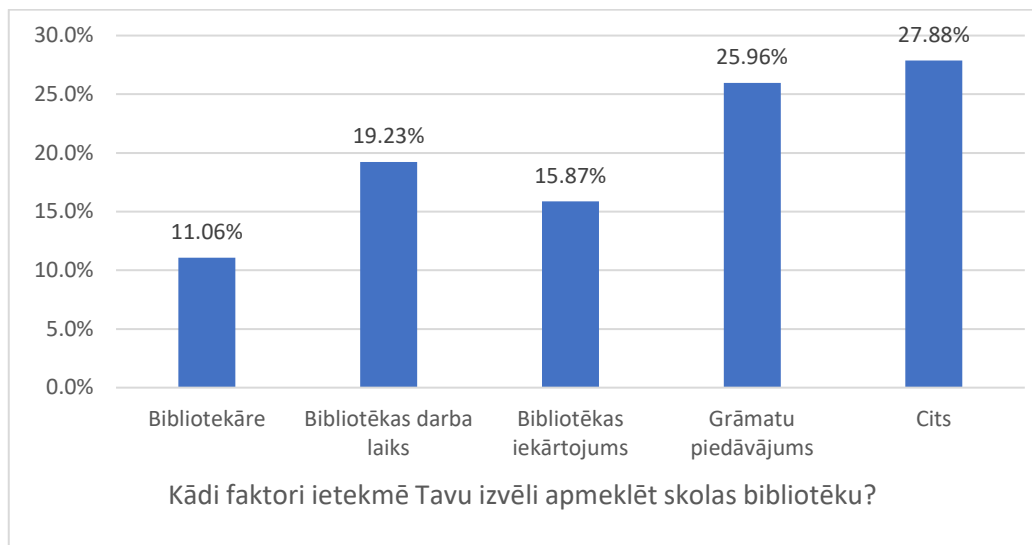
Savukārt, analizējot skolas bibliotēkā pavadīto laiku, ir vērojamas atšķirības starp tiem, kam *patīk* un *drīzāk patīk* lasīt grāmatas, un starp tiem, kam *nepatīk* un *drīzāk nepatīk* lasīt grāmatas. Piemēram, visi respondenti (100%), kas atzīmēja, ka grāmatas tiem *nepatīk* un *drīzāk nepatīk* lasīt, norādīja, ka skolas bibliotēkā labprāt pavada laiku viedierīcēs vai satiekoties ar draugiem, kamēr tiem, kam *patīk* un *drīzāk patīk* lasīt grāmatas, to dara 82,05% respondentu (sk. 1.tab.).

*1.tabula. Respondentu bibliotēkas apmeklēšanas paradumi un īstenotās aktivitātes bibliotēkā (autoru veidots)*

*Table 1 Respondents' library-attending habits and library activities (authors' compilation)*

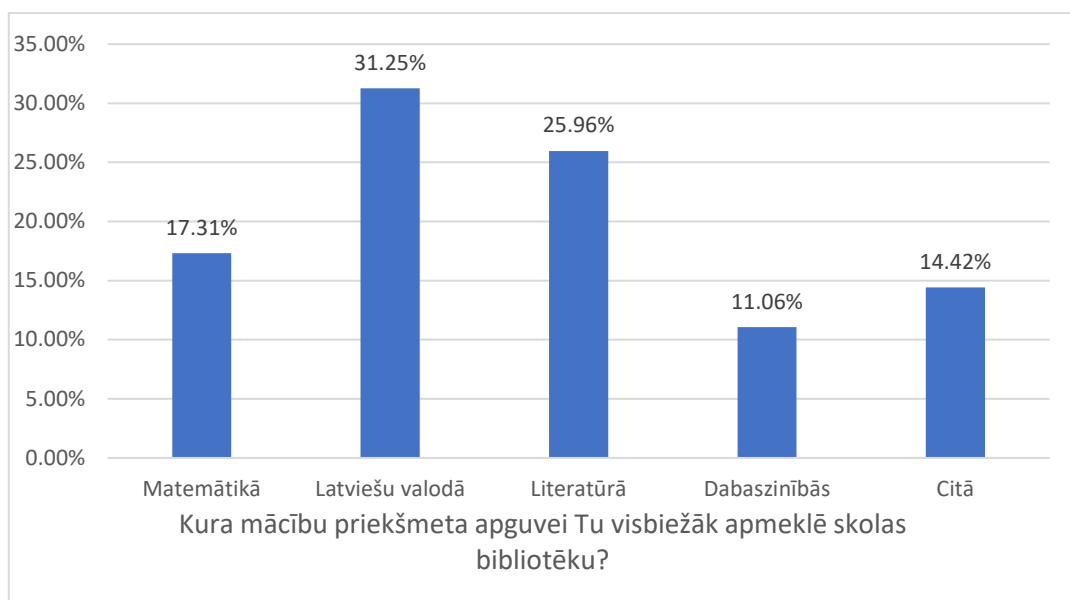
<i>Attieksme pret grāmatu lasīšanu</i>	<i>Neapmeklē skolas bibliotēku</i>	<i>Apmeklē skolas bibliotēku</i>	<i>Ja apmeklē, tad skolas bibliotēkā lasa, mūcās</i>	<i>Ja apmeklē, tad skolas bibliotēkā pavada laiku viedierīcēs vai ar draugiem</i>
Jā, patīk; drīzāk patīk	35%	65%	92,31%	82,05%
Daļēji patīk	44,79%	55,21%	96,23%	92,45%
Nē, nepatīk; Drīzāk nepatīk	80,77%	19,23%	90%	100%

Pieper (2017) un Zvirbule (2004) akcentē, cik svarīgi skolēnam ir vieta, kur viņam ir brīva izvēle, ko lasīt, kurā respektē viņa izvēli, kurā pieaugušie rāda priekšzīmi. Faktori, kas ietekmē izvēli apmeklēt vai neapmeklēt skolas bibliotēku ir dažādi, taču 25,96% respondentu atzīst, ka viņiem noteicošais ir grāmatu piedāvājums. Savukārt 11,06% respondentu norāda tieši skolas bibliotekāru kā noteicošo faktoru apmeklēt vai neapmeklēt bibliotēku. Izvēloties atbildi *cits*, tika akcentēts, ka izvēli apmeklēt vai neapmeklēt skolas bibliotēku ietekmē *laika trūkums (treniņi, pulciņi); nepieciešamība gatavoties mācību stundām; mācību priekšmetu skolotāju pamudinājums; nav vajadzības, jo mājās ir grāmatas* u.c. (sk. 1.att.).



1.attēls. *Skolas bibliotēkas apmeklējuma ietekmējošie faktori* (autoru veidots)  
Figure 1 *Factors influencing school library attendance* (authors' compilation)

Savukārt respondentu minētie mācību priekšmeti, kuru īstenošanā visbiežāk ir bijusi nepieciešamība apmeklēt bibliotēku, tika norādīta latviešu valoda (31,25%) un literatūra (25,96%). Schultz-Jones & Ledbetter (2021) atzinīgi novērtē skolas bibliotēku kā mācību vidi pētniecības jomā dabaszinātnēs, taču iegūtie empīriskie dati atklāj, ka tikai 11,06% respondentu norādīja, ka skolas bibliotēku apmeklē, lai mācītos dabaszinības (sk. 2.att.).



2.attēls. *Mācību priekšmeti, kuru apgūvei skolēni visbiežāk apmeklē skolas bibliotēku* (autoru veidots)  
Figure 2 *Subjects in which students most often visit the school library* (authors' compilation)

Atbildot uz jautājumu: Kāds būtu Tavs ieteikums skolas bibliotēkām, lai bibliotēku apmeklētu vairāk skolēnu?, vairums respondentu atzina, ka ir nozīmīgi papildināt grāmatu krājumu. Empīrisko datu analīze arī ļauj secināt, ka, lai sekmētu skolēnu interesi par lasīšanu un lasītprieku, kas cieši saistīts ar pašvadītu mācīšanos, ir būtiski nodrošināt lasīšanu veicinošu vidi.

Lai aktualizētu skolas bibliotēku kā skolēnu pašvadītas mācīšanās veicinošu vietu, publikācijas autore uzskata, ka nepieciešama lielāka sadarbība ar mācību priekšmetu skolotājiem, piemēram, rīkot tematiskās rosinātavas, darbnīcas, kas veicina informācijpratību, sociāli atbildīgas rīcības paradumus u.c.

### **Secinājumi** **Conclusions**

Lasīšana, neatkarīgi no tā vai tā norisinās mācīšanās nolūkos, vai arī savam priekam, ir lielā mērā pašvadīts process, kurā skolēns patstāvīgi lasa, izprot, analizē un kritiski izvērtē izlasīto, un formulē savu viedokli par to, kā arī apzinās savus personīgos mācību mērķus saistībā ar izlasīto un tā nozīmi turpmākajā dzīvē.

Jaunākie pētījumi atklāj, ka Latvijas skolēnu vidējie sasniegumi lasīšanā ir zemāki nekā iepriekš. Lejupslīde ir vērojama kopš 2012.gada. Gan teorētisko izziņu avotu, gan empīrisko datu analīze atklāj nepieciešamību vairāk palielināt skolas bibliotēkas klātbūtni mācību procesā. Skolas bibliotēka ir daļa no skolas kā mācīšanās organizācijas, kas nepārtraukti pielāgojas jaunajiem apstākļiem. Tāpat kā skolas, arī skolas bibliotēkas darbības mērķim ir jābūt vērstam uz skolēna izaugsmi.

Iegūtie empīriskie dati apliecina, ka skolēni labprātāk izmanto skolas bibliotēku, lai satiktu draugus vai pavadītu laiku viedierīcēs. Savukārt teorētiskās izziņas avotu analīze atklāj, ka ir nepieciešams sadarboties ar mācību priekšmetu skolotājiem, lai mērķtiecīgi organizētu, plānotu skolēnu pavadīto laiku skolas bibliotēkā, lai tas būtu produktīvs un lietderīgs, piemēram, ar mācību saturu saistītu datorspēļu spēlēšana, konkrētas informācijas meklēšana u.c.

Teorētisko datu analīze atklāj, ka mainās arī bibliotēkara loma. Skolas bibliotēkas vides izmantošana mācību procesā ir atkarīga no bibliotēkara vitalitātes, kurš ir ne tikai procesa atbalstītājs, bet arī īsteno sadarbību gan ar skolēniem, gan dažādu priekšmetu skolotājiem. 21.gadsimtā, tehnoloģiju attīstības gadsimtā bibliotēkars ir kā skolēna palīgs informācijpratībā. Pārejot no mācīšanās, kā izmantot tehnoloģiju rīkus, uz mācīšanu, kā tehnoloģijas izmantot radošumam un jēgai. Empīrisko datu izpēte atklāja, ka daļai skolēnu tieši bibliotēkara personība ir noteicošais apmeklēt vai neapmeklēt skolas bibliotēku.

Skolas bibliotēkas primārā funkcija ir lasītprasmes veicināšana, kas ir cieši saistīta ar pašvadītu mācīšanos, kas arī prasa pašdisciplīnu, savas uzvedības un emociju regulāciju, pašanalīzi. Skolas bibliotēka ir lasīšanu, kā arī pašvadītas

mācīšanos veicinoša vide. Tur ir brīva izvēle, ko lasīt. Empīrisku datu analīze atklāja, ka skolēniem ir svarīgs grāmatu piedāvājums skolas bibliotēkā, kā arī viņi ir izmanto esošā grāmatu klāsta skolas bibliotēkā potenciālu savu individuālo mācīšanās mērķu sasniegšanai.

## Summary

In today's technological age, it is essential to strengthen students' literacy, where they read independently, comprehend, analyse and critically evaluate what they read, and form their own opinions about it, as well as being aware of their personal learning goals in relation to what they read and its relevance for their future lives. The latest PISA 2022 literacy surveys show that the average reading achievement of students in Latvia is lower than previously. The decline has been observed since 2012. Literacy is a part of the whole learning process, so there is a need to increase the role of the school library in the learning process. Research shows that students prefer to use the school library to meet friends or spend time on their smart devices, so there is a need to work with subject teachers to target, plan and organise students' time in the school library to be productive and useful, e.g. playing content-related computer games, searching for specific information, etc. The role of the librarian is also changing. The use of the school library environment in the learning process depends on the vitality of the librarian, who is not only a supervisor of the process, but also a collaborator both with students and with teachers of different subjects. In the 21st century, the century of technological development, the librarian is the student's assistant in information literacy. Moving from teaching how to use technology tools to teaching how to use technology for creativity and meaning. For some students, it is the personality of the librarian that determines to attend or not to attend library.

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# STUDENTS' PERCEPTION AND ATTITUDE TOWARDS SCIENTIFIC WORK DURING UNIVERSITY STUDIES

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**Abstract.** *Strengthening the scientific component within the structure of the educational process in modern higher educational institutions in Ukraine has determined the task of clarifying students' perception of the essence of conducting scientific work. The topicality of the research is determined by the fact that in the conditions of the current structure of university life, based on the principle of student-centeredness, students are autonomous subjects of study who participate in the educational process evaluation and improvement within the framework of the relevant curricula. The goal was to determine the perception and clarify the attitude of students towards the scientific work that is carried out in the university environment (based on the Ukrainian example) and to which they were involved during their studies. The following methods were used for its realization: theoretical (analysis, concretization, synthesis and systematization – while the scientific problem justification; generalization – for formulating the obtained results); empirical (written survey – questionnaire “Assessment of my scientific work during university study”); mathematical (calculation of the results). The article outlines three levels of students' scientific work that takes place in the modern educational environment of the university: mastering the educational component “Fundamentals of Scientific Research”; involvement in various types of scientific work conducted in the system of higher educational institutions; carrying out research within the framework of the scientific subject-matter, scientific projects. The perception of students regarding the content and accomplishment of scientific work during their study at the university is presented, as well as recommendations for its improvement based on the results of the developed author's questionnaire, which included 15 questions. Conclusions reveal the students' awareness of the necessity for the scientific work tasks and their attitude towards their own participation as full-fledged subjects in the carrying out scientific research. The prospects of the raised problem will be the development of a strategy for improving student scientific work at the university through the prism of its evaluation by students.*



**Keywords:** *curriculum, educational process in a higher educational institution, scientific research, scientific work, students' evaluation of their own scientific work, university students.*

## **Introduction**

The current changes taking place in the higher education system of Ukraine primarily concern the strengthening of the scientific component within the structure of educational processes in modern universities. This is related to a series of reformative innovations driven by the implementation of European Strategy for Universities (European Commission, 2022). Efforts should be directed towards achieving the following key objectives: “ensuring the enhancement of transnational cooperation between universities” in the sector of carrying out scientific research, involving business, observing academic values, and introducing innovations. Scientific activity as a creative-intellectual experimental search, aimed at the implementation and verification of new ideas in order to obtain new knowledge and facts and implement them in practice in order to improve the efficiency of indicators, is defined as a priority.

In the current university environment, based on adherence to the principle of student-centeredness, education seekers emerge as autonomous agents in developing the educational process. They are involved in the evaluation and introduction of the changes aimed at improving the educational curricula they are enrolled in, which include, as a compulsory component, the basics of conducting scientific research. In view of the above, the task of clarifying students' perception towards the essence of carrying out scientific work and their attitude to such activity during their studies at the university have arisen. Therefore, the relevance of the research is determined by the need to implement European integration processes in Ukrainian universities and, in particular, in the aspect of conducting student scientific work.

It is worth noting that the raised issue is topical for the global educational arena, since the outcomes of students' scientific activities during their education in higher educational institutions have a significant impact not only on their own future careers (Belgrave & Jules, 2015; Rätty et al., 2018), but also on the development of respective fields of study, thus affecting society in general (Ferrero, 2020; Castro-Rodríguez, 2022; Van Eeden, Eloff, & Dippenaar, 2021). Ensuring diverse scientific work of students in a modern university is a guarantee of their personal growth and professional training.

**The purpose of the study** – determination of perception and clarification of students' attitude to scientific work, which is carried out in the university environment (based on the example of the Ukrainian ones) and in which they were involved during their studies.

**Research objectives:** (1) to conduct a theoretical study on the organization of students' scientific work based on the analysis of the resources; (2) outline the main aspects of the students' scientific work organization in the educational environment of a modern university; (3) to empirically determine students' positions regarding their scientific work during university study based on thematic surveys and analysis of their results.

The following **methods** were applied to achieve the set goal and tasks: theoretical (analysis, concretization, synthesis and systematization – in the course of justifying the raised scientific problem and determining its main aspects; generalization – for formulating the obtained conclusions); empirical (written survey – questionnaire “Assessment of my scientific work during university study”); mathematical (for calculating results).

### Literature review

The issue of increasing the share of the research component in the system of training specialists in higher educational institutions is the subject of study for many scholars from various countries (Belgrave & Jules, 2015; Lokhvytska, 2023; Munna & Kalam, 2021; Shcherban & Gut, 2023). The dominant feature of professional readiness is the ability to offer innovative suggestions, generate ideas, and test them based on organizing and carrying out scientific research (Ferrero, 2020; Rätty et al., 2018; Shtonda, Biletska, & Proskurnia, 2022). It is the research component in professional training that will contribute to ensuring a high level of competitiveness for professionals able to introduce scientific results to practical activities (Castro-Rodríguez, 2022; Schoor, 2023; Van Eeden et al., 2021).

The implementation of the student-centered principle in the educational process of a modern university is directly related to the organization of students' research activities and the discussion of its results, followed by their practical implementation (Belgrave & Jules, 2015; Shtonda et al., 2022). According to C. Schoor (2023), the development of students' desire for scientific work makes a kind of bridge between the “utility of science” and “personal experience”. The success of strengthening this tandem is directly dependent on students' mastering the content of educational components on the methodology of science, which develops students' “confidence in science” (Schoor, 2023). Thus, it is necessary to ensure the conceptualization of knowledge among students about the essence of scientific work and to stimulate the development of their research competence “as a complex individual's development” and an indicator of professional preparation for “conditions of multi-role research activity (design and tasks implementation), <...> ascertainment <...> of connections and ability for further self-education” (Shcherban & Gut, 2023: 88). As noted by S. Mykhyda et al. (2020), within the university education system, there are

various opportunities for students to gain experience in organizing and conducting research work, the most common of which include participation in scientific activities and societies.

However, it is not uncommon for students to encounter difficulties during research activities, as they may lack certain skills in “introducing thoughts intelligently, legitimately, plainly, and carefully is the complex part of writing the research paper” (Micabalo et al., 2020). Therefore, in the process of teaching educational components, it is important to prepare students for conducting research and writing scientific papers. As emphasized by K. Belgrave & J. Jules (2015), the more attention is given to students' practice in carrying out scientific work, the more successfully their research skills will develop, and the greater their awareness of the value and utility of science in its broader sense will be formed as well. First and foremost, students are supposed to know how to present the results of scientific research, preparing the text of an article, which is an efficient way of presenting scientific information (Protas, 2021). The organization of students' scientific activity is facilitated by their motivation to apply willpower during research, critical thinking, the desire to improve knowledge, the formation of practical skills, and the enhancement of professional readiness (Lokhvytska, 2023).

Students' awareness of the functionality of research and its essential application to real-life situations “leads to a positive attitude towards their own scientific work” (Belgrave & Jules, 2015). The orientation towards scientific inquiry activates students to independently acquire necessary information, apply acquired knowledge, and creatively accomplish assigned research tasks. The combination of academic and research work with practical activities creates a foundation for the development of an active research position in education seekers. This contributes to the development of their own scientific potential and the accumulation of skills to critically analyze the sources, apply methods of scientific search, make conclusions, prepare and defend scientific projects (papers) (Castro-Rodríguez, 2022; Ferrero, 2020; Van Eeden et al., 2021).

Thus, theoretical study of the organization of students' scientific work gives reasons to conclude that in university education, significant attention should be paid to the practical implementation of the research component to enhance graduates' professional readiness. The next task is to outline the main aspects of organizing student research work in higher educational institutions.

## **Organization of Students' Scientific Work within the Educational Environment of Modern University**

(based on Hryhorii Skovoroda University in Pereiaslav and The Bohdan Khmelnytsky National University of Cherkasy, Ukraine)

In general, the students' scientific work can be classified according to the following three levels, based on the content and specifics of its implementation: 1) students' scientific work, which is provided by the curricula and program of study and is compulsory; 2) students' scientific work that supplements the educational process (carried out supplementary to the educational and professional program); 3) extracurricular scientific work of students, carried out together with other subjects of the educational process. *We present a description based on the organization of the educational process for the first-level (bachelor's degree) students of specialties 012 Preschool Education and 231 Social Work.*

Regarding to *the first level of student scientific work*, according to the bachelor's curriculum, the "Regulatory Part" block includes the teaching of the educational component "Fundamentals of Scientific Research" during the second term. In the fourth semester, students are expected to prepare and defend a course paper on child psychology, and in the sixth term, they are required to prepare and defend a course paper on preschool education or methodology. Each of the mentioned educational components includes 3 ECTS credits, which is equal to 90 academic hours.

In particular, the educational component "Fundamentals Scientific Research" provides 16 hours of lectures and 14 hours of practical classes and 60 hours of independent work – for full-time mode of study, and 6 hours of lectures, 4 hours of practical classes and 80 hours of independent work – for part-time mode of study. The vision of studying independent students' work involves mastering the methodological principles of carrying out scientific research, acquiring knowledge about psychological-pedagogical research methods, and gaining practical skills in organizing research and experimental work within the context of the real process (for the specialty 012 Preschool Education – in preschool educational institutions, for the specialty 231 Social Work – in social sphere institutions). The purpose of teaching this educational component is training of highly qualified specialists in the field of preschool education, who are capable of carrying out independent scientific research on multifaceted problems related to the education, development and upbringing of preschool children. The range of scientific issues has a direct dependence on the tasks set in the field of psychology and pedagogy of preschool education, which are determined by the social demands of society and the requirements of today's practice. Regarding the main tasks of the educational component, the following are defined: • giving students basic knowledge and skills on the basics of

conducting scientific research; • providing students' awareness of scientific principles and scientific approaches, about the specifics of stating a scientific problem, its evaluation and solution; • improvement of general educational skills – development and study of scientific psychological, pedagogical and methodical primary sources: to carry out a scientific review and critical analysis of literature, to make its generalization and systematization; • gaining by students the abilities and skills in using research methods (diagnostic and formative); • formation of skills to creatively use the results of scientific research in the teaching process, development and teaching preschool children (during the preparation of course work and scientific projects).

Two types of course projects are compulsory constituents of the curriculum. The course work is an educational task of students and at the same time the first attempt to organize and carry out scientific work by them, which is carried out independently on the basis of the knowledge and skills acquired in the course of education from specialized educational components. The purpose of a course work is to deepen students' knowledge of current problems of the relevant educational components; in the further development of their ability to independently and critically analyze scientific sources; in the development of students' research abilities and skills; in stimulating students to further active search.

*The second level of scientific work* lies in the fact that students are involved in various types of scientific work, which is organized and conducted both at the university where they receive their education, and in others, including scientific institutions, organizations, etc. The main forms of such students' scientific work include participation in student scientific workshops, creative problem groups, scientific work of students on the basis of experimental preschool education institutions, participation in students' Olympiads, various types of scientific activities (webinars, symposia, conferences, etc.), competitions of student scientific works of different levels (university, regional, all-Ukrainian and international).

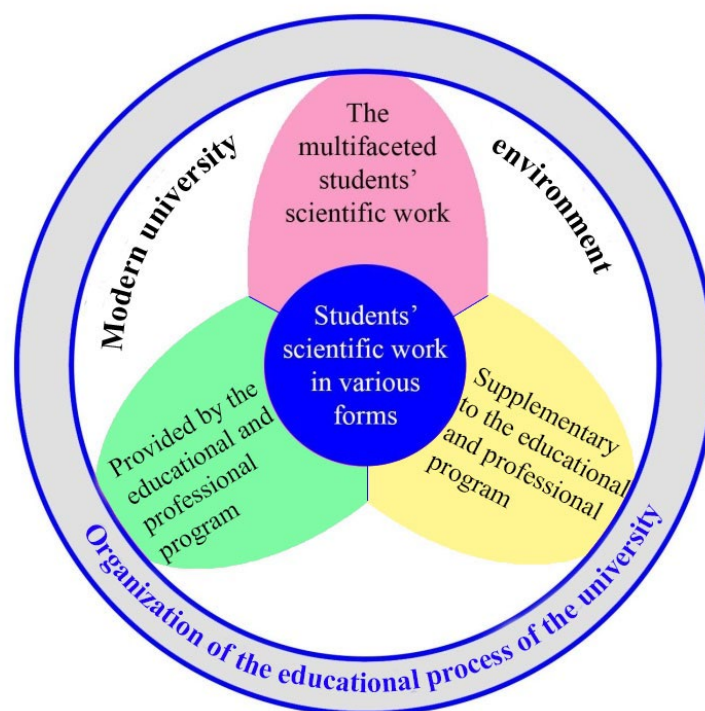
Regarding *the third level of students' scientific work*, their participation in psychological-pedagogical research conducted by graduate departments of the university in accordance with the approved topic is foreseen; in international scientific programs (competitions, grants); in scientific work on the basis of foreign partner universities, carried out in scientific collaboration in accordance with the collaboration agreements.

The bodies that coordinate the organization of the scientific work of students of the second and third levels are the departments of scientific and project activities (sector of scientific work of students) and international activities (sector of international mobility of students), as well as the scientific society of university students. All students have the opportunity to conduct research on their own initiative and with the help and under the guidance of

experienced scientists, to submit completed works to relevant scientific competitions, Olympiads and exhibitions, to publish in collections of student scientific articles and to implement the obtained results of psychological and pedagogical gaining in the educational process.

Carrying out scientific work tasks by students in conditions of the current university environment has its own specifics, as it is based on the use of information and communication technologies and relevant Internet resources. These include electronic digital libraries, Internet reference and search systems, WEB-sites of various scientific areas (in particular, psychological and pedagogical areas), etc. In turn, this contributes to both the implementation of the tasks of the relevant educational components of the bachelor's educational and professional program regarding the formation of students' knowledge about scientific research and the initial skills of conducting it, as well as the students' involvement in scientific research activities at various stages of university studies.

Conventionally, the organization of students' scientific work in the environment of a modern university can be visually presented in the form of a scheme (see Figure 1).



**Legend:**

- first level (compulsory);
- second level (supplementary);
- third level (extracurricular)

*Figure 1 Conventional and visual scheme of students' scientific work during university study (made by authors)*

That is, students' scientific work in the modern university environment can take place in various ways: from the implementation of the tasks of the relevant educational components of the educational and professional undergraduate program to involving them in scientific and research activities at various stages of education. The characterized levels of students' scientific work taking place in the modern university educational environment will be taken as a basis when developing a questionnaire for the empirical stage of the research.

### **Methodology of research**

**Research tools.** Using the survey method, students were surveyed by filling out a developed author's questionnaire "Assessment of my scientific work during university study", which was hosted on the Google Forms service (see <https://forms.gle/EkTassqkTQ6TGXSM7>). The questionnaire is based on the scientific statements of D. Abun et al. (2023), K. Belgrave & J. Jules (2015), B. Chang (2019), P. Kakupa & H. Xue (2019), M. Saini et al. (2020) regarding self-analysis conducted by respondents aimed at determining the depth of knowledge about the basics of scientific research and identifying "weaknesses" in the implementation of scientific work tasks; clarifying their personalization as participants in scientific activities of various formats and levels, as well as to collect about providing assistance to students in establishing connections for the implementation of scientific activities and with the aim of improving its organization in general.

In total, the thematic questionnaire included 15 questions, of which: 6 questions had multiple-choice responds and 9 questions with an open respond (respondent's own opinion). The list of questions is conventionally grouped into three blocks, reflecting the three levels of students' scientific work characterized above: mastering the educational component "Fundamentals of scientific research" (questions 1.1–1.5); involvement in various types of scientific work carried out in the system of higher educational institutions (questions 2.1–2.5); conducting research within the framework of the implementation of scientific subject-matter, scientific projects (questions 3.1–3.3), as well as general students' assessment of scientific work at the university (question 4) and recommendations for its improvement (question 5).

**Data collection procedure and methods of analysis.** The research took place during the 2022-2023 academic years in the following stages: in the first (September-November 2022) – the questionnaire was drawn up and its technical preparation took place; on the second (December 2022 – February 2023) – collection of actual data was carried out on the basis of questionnaires filled out by respondents; on the third (March – June 2023) – the obtained results were processed through both quantitative and qualitative analysis, interpretation,

conclusion formulation, and identification of improvements for students' scientific work during their university studies.

**Study sample are described.** The survey was conducted among students of the 4th year of study (first (bachelor) level of higher education) at Hryhorii Skovoroda University in Pereiaslav and Bohdan Khmelnytsky National University of Cherkasy (Ukraine) of the educational and professional program (hereinafter EPP) of the specialty 012 Preschool Education and EPP of the specialty 231 Social Work. The choice of such a research group is due to the fact that the students in the 1st year have already mastered theoretical training in the relevant educational component "Fundamentals of Scientific Research", in the 2nd and 3rd years of study they prepared the term projects, and also participated in various scientific activities. Previously, the participants of the survey did not receive any explanations about the purpose of the study, which made it possible to avoid any external influence on the results of the survey. The total number of respondents who took part in filling out the questionnaire is 146 participants.

### Results of research

We present the results obtained on the basis of the collection and processing of questionnaire data. In the process of quantitative and qualitative analysis of participants' responds, not a single invalid questionnaire was found, therefore, all the received questionnaire data were considered. We present the results of the quantitative analysis and qualitative interpretation of data regarding students' perception and attitude towards scientific work during their studies at the university according to the outlined levels of its organization.

**The first level** – is scientific work prescribed by the educational and professional program.

The received results to the closed questions (1.1., 1.4. and 1.5.) are given in table 1.

*Table 1 Quantitative analysis of the respondents' survey "Assessment of my scientific work during university study" (first level of scientific work) (made by authors)*

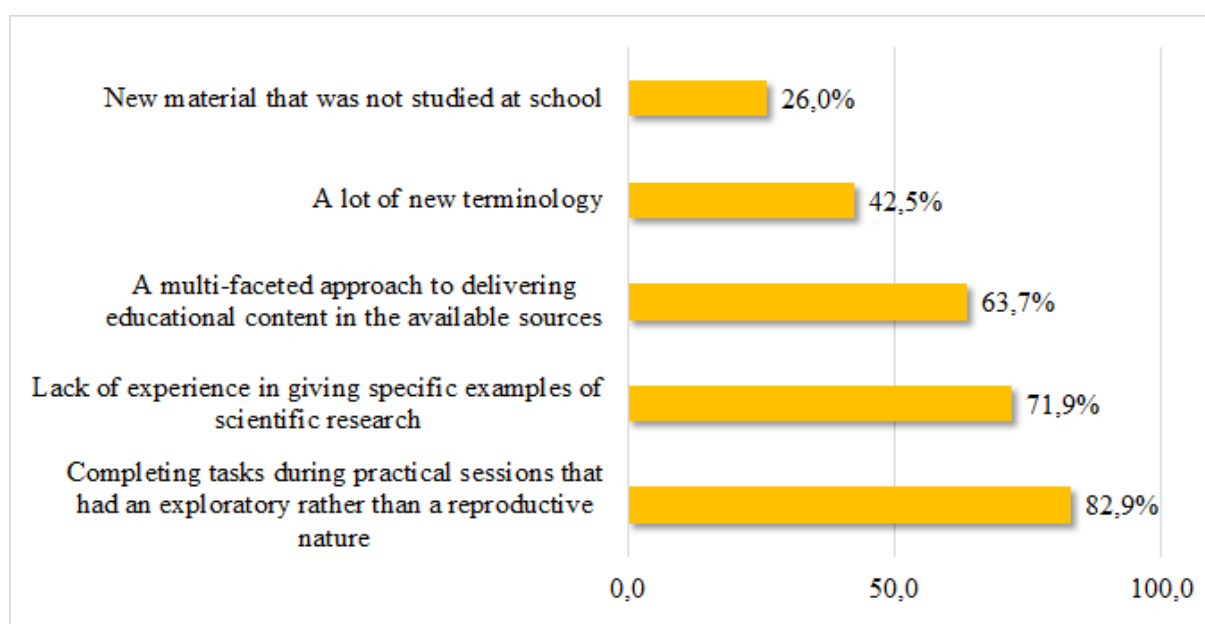
№	Content of the question (according to the questionnaire)	Index			
		Yes		No	
		n	%	n	%
1.1.	Has the educational component "Fundamentals of scientific research" contribute to your awareness of conducting scientific work?	127	86.9	19	13.1
1.4.	Was it challenging to prepare the term paper?	38	26.1	108	73.9
1.5.	Did working on the term paper contribute to the emergence of a desire for scientific activity?	113	77.4	33	22.6

*n=146*



Based on the analyzed responses to question 1.1. “Has the educational component “Fundamentals of scientific research” contribute to your awareness of conducting scientific work?”, it was found out that the vast majority of respondents (86.9%) succeeded in mastering its content for further conduct of scientific work. However, 13.1% of the respondents indicated that their expectations from studying this educational component were not met; they felt lack of the knowledge acquired to accomplish the tasks of scientific research.

In response to question 1.2. “What was challenging in mastering the educational component “Fundamentals of Scientific Research”?”, students gave responds that were classified in a generalized manner based on the essence of their expression (See Figure 2).



*Figure 2 The challenges expressed by students in mastering the educational component “Fundamentals of Scientific Research” (made by authors)*

During the survey, it was determined which factors, hindering the mastery of the educational component “Fundamentals of Scientific Research”, were indicated by the students. Among them, almost a third (26.0%) indicated that it was “new material that has not been studied at school”; 42.5% noted “a lot of new terminology”; more than half of the respondents (63.7%) referred to it as “a multi-faceted approach to delivering educational content in the available sources” because the list of recommended sources consisted of many ones; for the majority (71.9%), it was challenging to “provide specific examples of scientific research due to lack of experience”, as at the time of studying the educational component (2nd term of studies), knowledge was still lacking, and it was significantly difficult to “complete tasks during practical sessions that had an exploratory rather than a reproductive nature”, as indicated by 82.9% of the

total number of respondents. The outlined findings give reasons to look for the ways to improve the efficiency of mastering the educational component “Fundamentals of Scientific Research”.

Responses to question 1.3. “What motivated you to study the educational component “Fundamentals of Scientific Research?” were categorized based on the similarity of students’ responses and presented in a summarized form (See Figure 3)

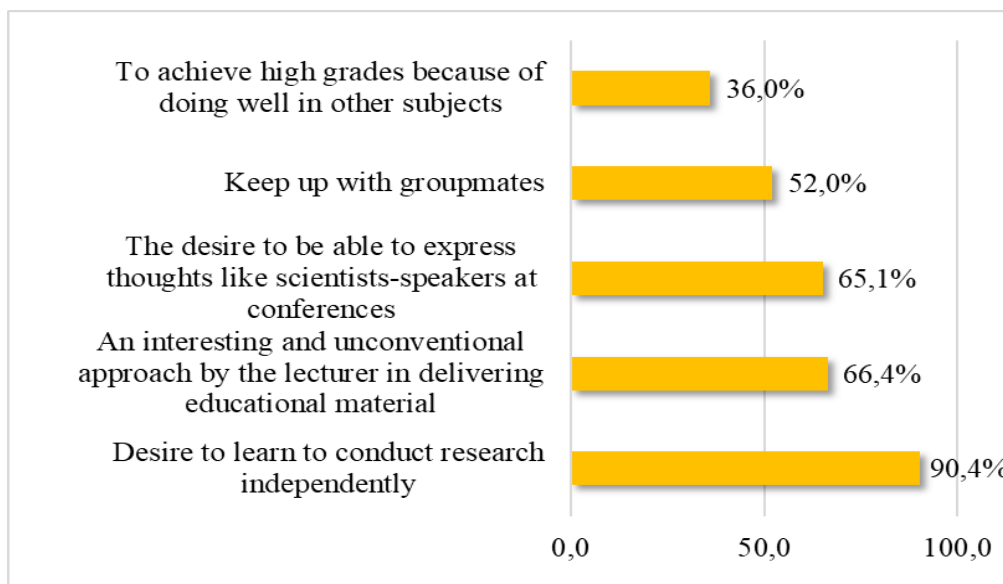


Figure 3 Students’ motivation in studying the educational component “Fundamentals of Scientific Research” (made by authors)

Regarding to the main motivations for studying the educational component “Fundamentals of Scientific Research”, students determined the following: “to achieve high grades because of doing well in other subjects” (36.0%), indicating the subjective nature of motivation; half of the respondents (52.0%) defined it as “keep up with groupmates”, which is also relative as previously characterized; however, the responses indicating “the desire to be able to express thoughts like scientists-speakers at conferences” (65.1%), “an interesting and unconventional approach by the lecturer in delivering educational material” (66.4%), and “desire to learn to conduct research independently” (90.4%) were positive from the perspective of an objectivity of the set goal.

To question 1.4. “Was it challenging to prepare the term paper?” (see table 1) 26.1% gave an affirmative response, and in 73.9% of the respondents noted that, it did not cause any difficulties, which proves the appropriate readiness of students to outline the theoretical issues of the researched issue and the ability to organize and conduct a scientific experiment while writing term papers.

The results obtained for question 1.5 are positive. “Did working on the term paper contribute to the emergence of a desire for scientific activity?” (see

table 1), where 77.4% of respondents noted that they developed a desire to further engagement in scientific work, however, 22.6% of respondents demonstrated a negative reaction, which is a troubling signal regarding their reluctance to seek the truth, which science is.

The responses obtained give reasons to consider the necessity to review the curriculum regarding the feasibility of teaching the educational component “Fundamentals of Scientific Research” during the 2nd term. It may reasonable to postpone it (for the 3rd or 4th terms), when students already have acquired some basic knowledge about the specialty, which will allow to complete the paper tasks more accurate. Students also need to demonstrate more the results of approbation and implementation of scientific research in the practical plane, which will stimulate them to independent scientific research and motivate them to achieve their goals.

**The second level** – is scientific work, which is supplementary to the educational and professional program.

In this block, closed questions were 2.1. and 2.3. Responds to them are presented in table 2.

*Table 2 Quantitative analysis of respondents' survey “Assessment of my scientific work during university study” (second level of scientific work) (made by authors)*

№	Survey question	Index			
		Yes		No	
		n	%	n	%
2.1.	Have you ever participated in students' scientific activities (webinars, conferences, workshops, etc.)	139	95.2	7	4.8
2.3.	Were you a member of a scientific group (research group)?	58	39.7	88	60.3

*n=146*

To question 2.1. “Have you ever participated in students' scientific activities (webinars, conferences, workshops, etc.)?”, 95.2% of respondents gave an affirmative response, only 4.8% of them gave a negative response, which is an encouraging fact and indicates the students' interest to participate in various scientific activities.

Students' responses to question 2.2. “What stimulated participation in student scientific activities?” are grouped according to the similarity of responses according to the following variables: educational, practical, personal and external (See Figure 4).

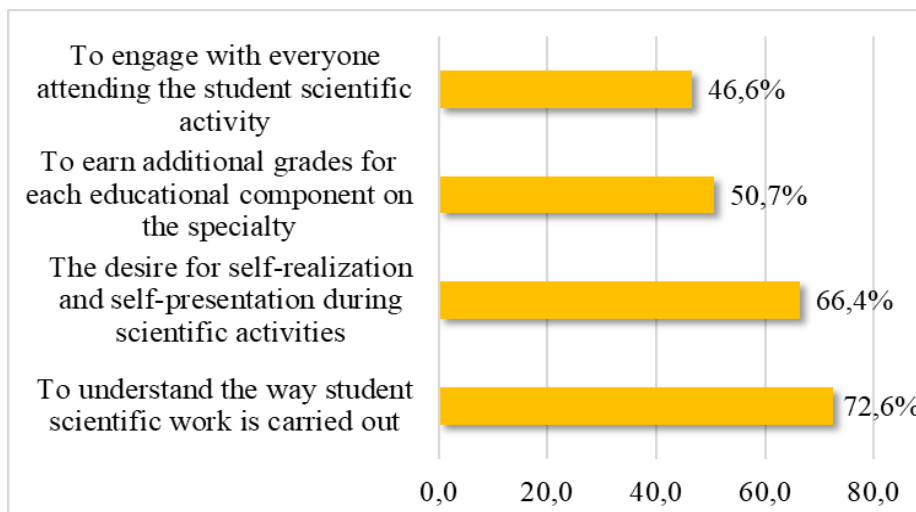


Figure 4 *Incentives determined by students to participate in student scientific activities (made by authors)*

According to the results of the survey, 46.6% of respondents indicated the external stimulus – “to engage with everyone attending the student scientific activity”; regarding educational, which was expressed as “hope to earn additional grades for each educational component on the specialty” there was almost the same number of responses – 50.7%. The personal advantage, in particular, “the desire for self-realization and self-presentation during scientific activities” was recorded in 66.4% and the practical one, which is seen as “trying to understand the way student scientific work is carried out”, took place in 72.6%. The obtained data indicate a conscious awareness of student participation in scientific activities.

To question 2.3. “Were you a member of a scientific group (research group)?” (see table 2) 39.7% of students gave a positive response, while 60.3% of them did not attend such associations. Such a phenomenon causes concern, because it is precisely such groups that allow students to gain experience in team student scientific work.

Received responses to question 2.4. “What motivated you to become a member of a scientific group (research group)?” are summarized by similarity according to the following parameters: educational, activity-related, personal (See Figure 5).

Regarding the identification of the main incentives for students to become members of a scientific club (research group), the obtained results were corresponding to the previous question and distributed in ascending order according to the following parameters: activity-related – “working in a team of like-minded people” (noted by 41.8% of respondents); educational – “desire to carry out research at a high level” (recorded in surveys of 54.1% of respondents); and personal – “to be an expert and constantly develop” (found

out in 58.9% of the responses). However, as the results demonstrate, due to the small number of student-members scientific clubs (research groups), the motivation to participate was also not diverse and high.

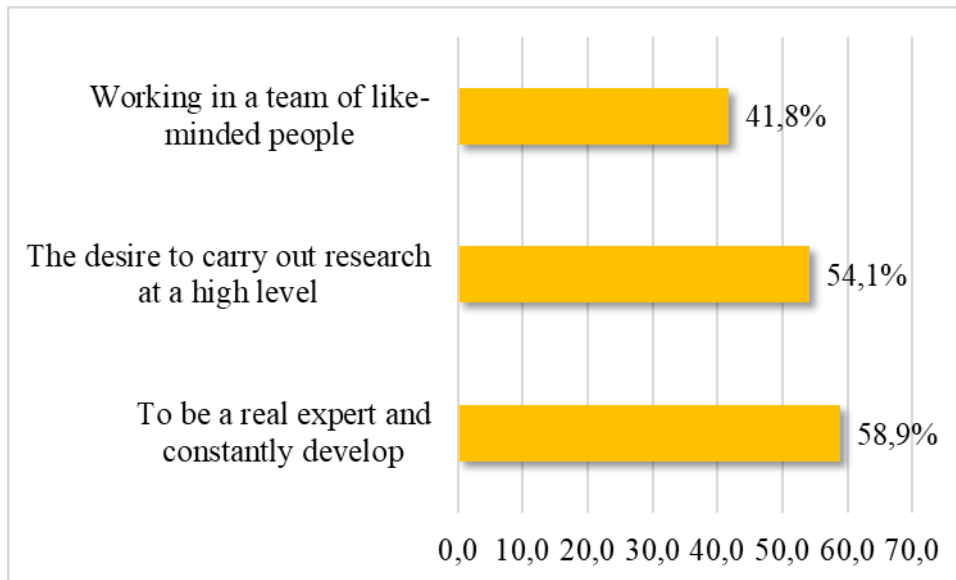


Figure 5 *Main incentives for students to become members of a scientific club (research group) (made by authors)*

Responding to the question 2.5. “What types of scientific work they participated in at the university?”, students mostly gave very similar responses (See Figure 6).

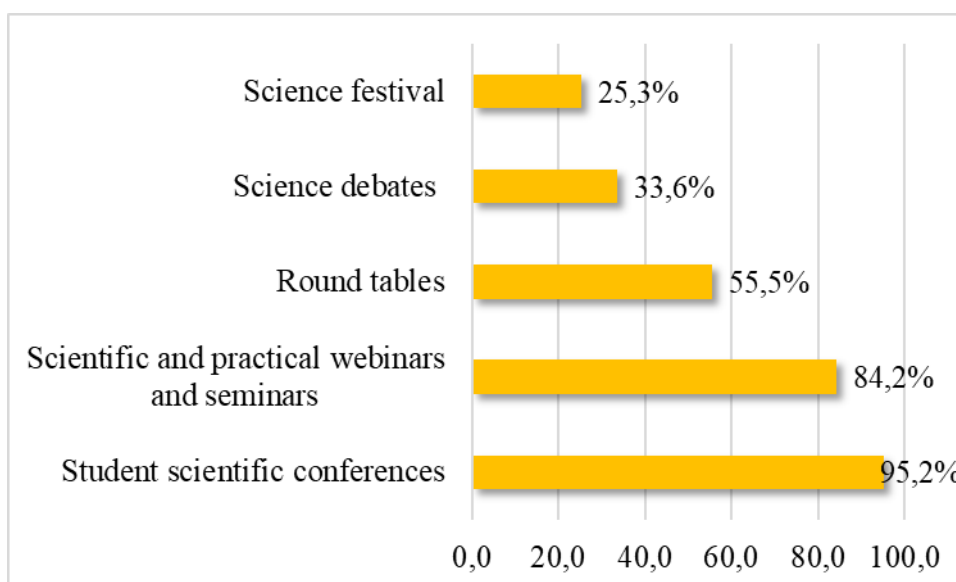


Figure 6 *Types of scientific events students have participated in during university study (made by authors)*

According to the results obtained for question 2.5., the most popular types of students' science work, in which they participated in during their university study, were: science festivals, although a small number of respondents pointed to them (25.3%); science debates, which was mentioned by more than a third of the respondents (33.6%); round tables, which were marked by more than half of the respondents (55.5%); but scientific and practical webinars and seminars (84.2%) and student scientific conferences (95.2%) took priority positions in the survey.

Thus, according to the results characterizing the students' scientific work, which is supplementary to the educational-professional program, a positive characteristic is observed. In particular, respondents noted a high level of participation in scientific activities, which is justified by personal and practice-oriented incentives. However, it was noted that mechanisms for involving students in membership in scientific clubs (research groups) need strengthening.

**The third level** – is scientific work, which is increasingly multifaceted.

According to the list of questions of this block, only question 3.1 was closed. Recorded responses are presented in Table 3.

*Table 3 Quantitative analysis of respondents' survey on "Assessment of my scientific work during university study" (third level of academic work) (made by authors)*

№	Survey question	Index			
		Yes		No	
		n	%	n	%
3.1.	Have you participated in thematic research, international scientific projects (programs, competitions, etc.)?	11	7.5	135	92.5

*n=146*

Received responses to questions 3.1. "Have you participated in thematic research, international scientific projects (programs, competitions, etc.)?" demonstrated extremely low indicators of student involvement – this is only 7.5%, while 92.5% of the respondents testified that they have not been involved. This fact should be a signal to strengthen such work.

Received responses to question 3.2. "What types of enhanced scientific activities students have participated in during university study?" were not large in number (See Figure 7).

Among the types of enhanced scientific activity in which students took part (question 3.2.), the respondents gave the following responses: "preparation of the presentation abstract on the researched issue together with the academic supervisor of the graduating department" – 4.8%, "research within the limits of academic mobility" – 6.2%, and "participation in conducting surveys for thematic research" – 7.5%. The indicators are quite low. Due to the lack of

involvement in this level of scientific work, the students of education cannot point to a range of its varieties.

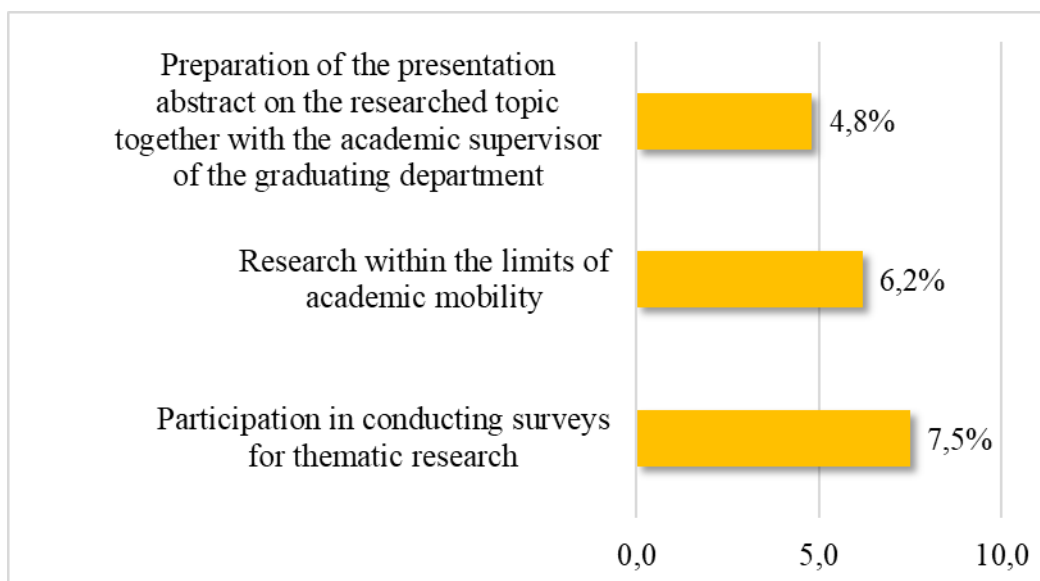


Figure 7 *Types of enhanced scientific activities students have participated in during university study (made by authors)*

Responses to questions 3.3. “What experience (if any) of scientific work did you gain at the university?”, were not too diverse, the students spoke about it in a somewhat stereotyped way (See Figure 8).

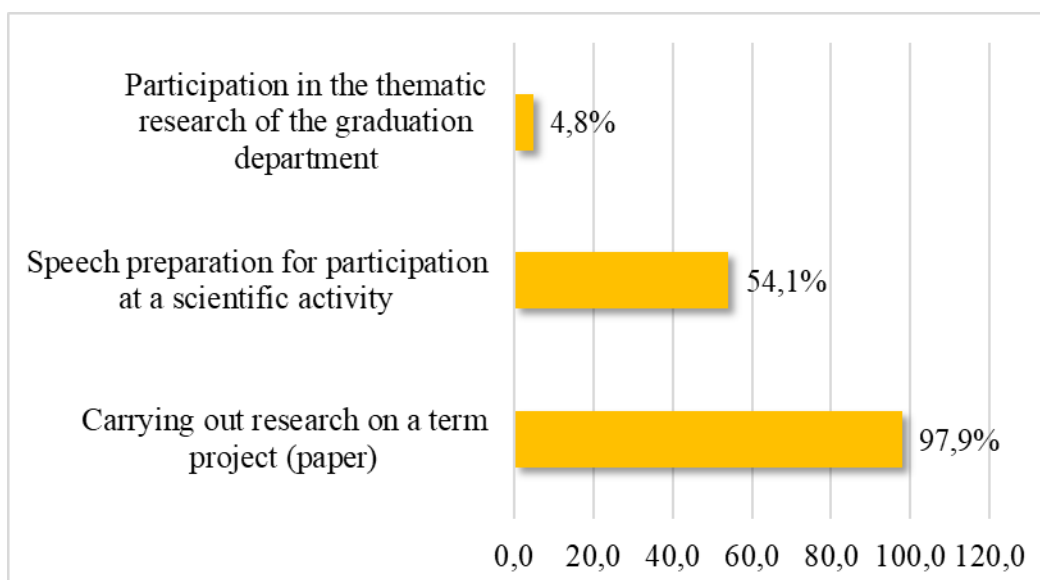
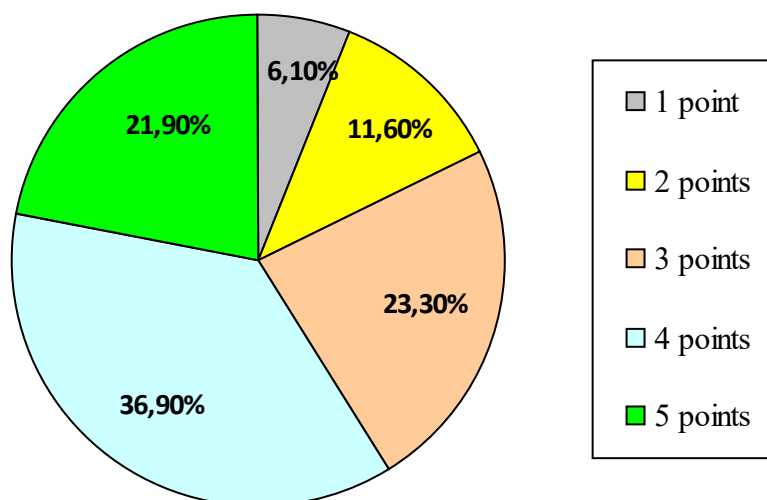


Figure 8 *Experience of scientific work students gained during university study (made by authors)*

According to processed quantitative data, responses to question 3.3. were distributed as follows: only 4.8% of the respondents indicated participation in the thematic research of the graduation department. However, a positive fact was confirmed by more than half of the respondents (54.1%) regarding their speech preparation for participation at a scientific activity, and almost all the students (97.9%) noted that they conducted research for a course project (term paper). Although the latter is an obligatory task in obtaining a bachelor’s degree.

Thus, the responses received from the questionnaires regarding the third level of scientific student work, defined as highly multifaceted, testified to the necessity for its significant strengthening, since an extremely small number of undergraduate students participate in thematic research, international scientific projects (programs, competitions, etc.). Their active involvement will contribute to the variety of types of scientific work in which students will be able to actively participate.

Giving respond to the 4th question of the questionnaire “How would you rate the student’s scientific work during your university study (in points from 1 to 5)?”, the respondents demonstrated different positions recorded in the Figure 9.



*Figure 9 Rating (in points) of the student’s scientific work during university study (made by authors)*

Assessing scientific work during university study (question 4), students were different in their opinions. Recorded responses of both a negative vision (1 point was given by 6.1% of respondents and 2 points – 11.6%, which is a total of 17.7%), which is almost a fifth of all respondents, and an average rating (3 points were rated by 23.3%), which is almost the same part, and positive (4 points are given by 36.9% and 5 points by 21.9% of respondents’ questionnaires, which is a total of 58.8%) in more than half of the survey



participants. In general, the obtained results provide a basis for developing a strategy for improving scientific student work at universities.

Regarding the 5th question “Your recommendations for improving the scientific work of students at the university”, the respondents’ answers were summarized in accordance with the specified content and ranked as follows (See Figure 10).

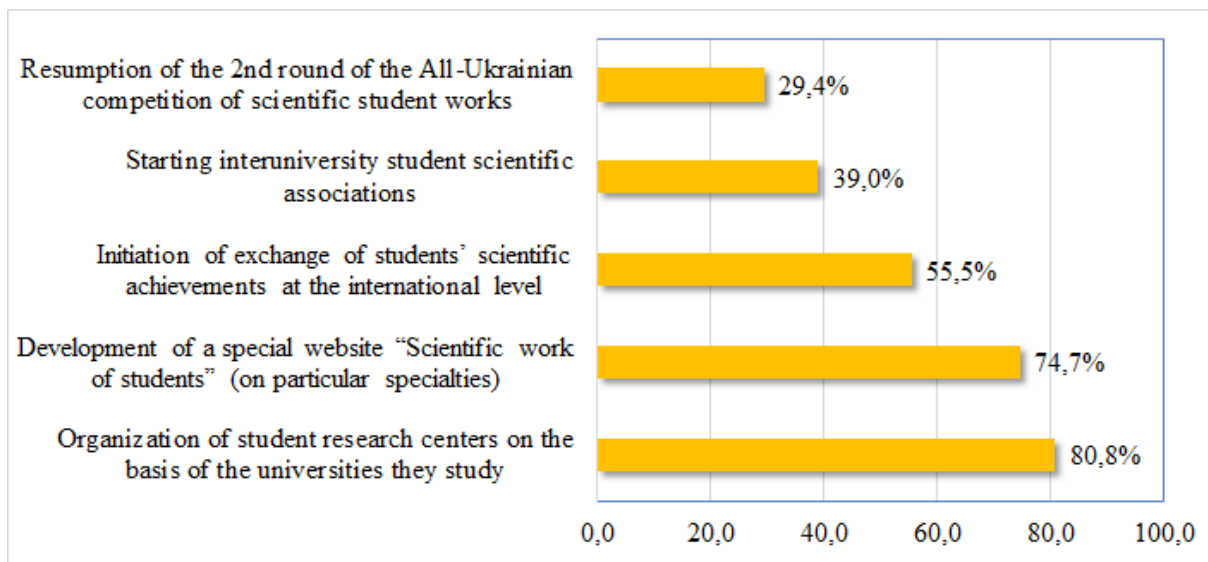


Figure 10 Recommendations suggested by students (made by authors)

The following generalizations can be made regarding to the recommendations given by students, aimed at improving the scientific work of the university during their studies:

- Students (29.4%) spoke in favor of “resuming the 2nd round of the All-Ukrainian competition of scientific student works”, because in connection with the introduction of martial law in Ukraine on February 24, 2022, due to the armed aggression of the Russian Federation, only the 1st round is held within universities, where students study. This issue will be solved when peaceful life is established in the Ukrainian state, so that every student, participating in such a competition in any city, wherever it may be held, feels safe and protected during the defense of their scientific work.
- 39.0% of respondents expressed support for the “starting interuniversity student scientific associations”, with their surveys indicating that such associations could exist both among home higher educational institutions and internationally. To implement this, an appropriate mechanism should be developed when concluding cooperation agreements with universities

- More than half of the students who took part in the survey want to “start the exchange of students’ scientific achievements at the international level” – 55.5%. The following arguments were given in their replies: “approbation materials for the results of scientific research should be made public to a wide audience, and not only in Ukraine”, “then we would know what arouses scientific interest among students from Europe, and what is interesting for us”.
- 74.7% of respondents spoke about “developing a special website “Scientific work of students” (on particular specialties)”. Thus, it was stated that its content should include operational information about new scientific achievements of students in the relevant field, announcements of scientific events, reports on those being held (these can be electronic collections of materials, video reports, etc.).
- The most popular recommendation was “organization of student research centers on the basis of the universities they study”. 80.8% of survey participants spoke in favor of it. In particular, it was noted that such centers should be specialty-based, since the scientific student society cannot cover the entire range of issues that require urgent solutions.

Thus, we can conclude that the recommendations suggested by the students to improve their scientific work are mainly aimed at expanding the range of thematic research communication, at the desire to be aware of the depth of the spectrum of the scientific problem that is studied not only within their country, but also in other countries (an effective way to integration of educational and scientific space), as well as further digitalization and application of information technologies in scientific activity. However, we emphasize that there is a restriction of the research results, as it was conducted among university students within one region – central Ukraine.

### **Conclusions and discussion**

Research on determining the perception and attitude of students towards scientific work, which is conducted in the university environment and in which they participated during their study (based on two Ukrainian institutions of higher education), provided the basis for outlining such conclusions and those debatable issues that need to be resolved:

(1) Based on theoretical study of the student scientific work organization in the university education system, conducted using analysis, synthesis, and specification methods, it has been clarified that the research component should be the dominant feature of students’ professional training. This is ensured by engaging students in various types of scientific work during their studies at

higher educational institutions. For this purpose, various opportunities should be developed for organizing and conducting research by students.

(2) The generalized and systematized main aspects of organizing student scientific work in the educational environment of a modern university are conventionally grouped into three levels: the first level involves mastering the educational component "Fundamentals of Scientific Research"; the second level – involving students in various types of scientific work carried out within the higher education system; the third level involves conducting research as part of fulfilling scientific issues, scientific projects, etc. These outlined positions formed the basis for the development of an author's questionnaire to accomplish the stated third task.

(3) While carrying out the empirical part of the study, the positions of students regarding their scientific work during university study were determined on the basis of the thematic questionnaire "Assessment of my scientific work during university study" and quantitative calculations and qualitative interpretation of the results of the analysis were carried out. The perception of the students regarding the content and their attitude to the performance of scientific work while studying at the university is presented. It is noted that students' awareness to the content of the educational component "Fundamentals of scientific research" should meet their research needs and ensure the success of professional training after mastering it. The essential involvement of education seekers in scientific work, which is supplementary to the educational and professional program and increasingly multifaceted, is emphasized. The importance of considering the recommendations suggested by students for its improvement is emphasized. In this way, the students' perception of the need for the scientific work tasks and their attitude towards their own participation as competent experts in the carrying out of the scientific research were revealed.

However, the following statement as "research is a mission for trust with the assistance of study, acknowledgment, association, and preliminaries in the journey for information through the goal and proficient methodology to discover answers for an issue" (Micabalo et al. 2020: 59) remains debatable. It is questionable in what way students' beliefs should be developed. When postulating scientists (Abun et al., 2023; Belgrave & Jules, 2015; Kakupa & Xue, 2019; Saini et al., 2020; Schoor, 2023), it is important to consider the impact of students' attitudes, their intentions, and ultimately the success and productivity of the conducted research for its practical implementation.

***Prospects for further scientific work.*** The prospects of the initiated issue will involve the development of a strategy to enhance student scientific work in the university through the prism of education seekers' assessment. Relying on the principle of student-centeredness in organizing the educational process, it is necessary to consider their perspective on improving scientific work, which will ensure the quality of education in general.

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## SOFT SKILLS DEVELOPMENT IN THE ENGLISH LANGUAGE CLASSROOM: STUDENTS' PERSPECTIVES ON THE PROBLEM

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**Abstract.** *The present-day globalised world is becoming more dynamic and soft skills become one of the main factors that enable people to participate actively in all aspects of life in it. Moreover, to succeed in personal and professional lives present-day students should be prepared to meet unpredicted challenges that are hard to imagine today. Taking into account the fact that the lists of soft skills are constantly changing and soft skills classifications provided by present-day researchers and practitioners vary greatly, the present research is aimed at finding out students' perspectives on the importance of soft skills identified by World Economic Forum 2023, on the one hand, and the role of English as a university discipline in soft skills development, on the other hand. To achieve the aim of the study, the researchers developed a questionnaire which included a combination of close-ended and open-ended questions and items on a 5-Likert scale (1 – very unimportant, 2 – unimportant, 3 – neutral, 4 – important, 5 – very important). Data collection lasted for four months and took place in September-December 2023 among students of Kyiv National University of Technologies and Design. To select the research sample, the researchers used a convenience sampling technique. The questionnaires were distributed by hand from researchers to first- and second-year students who studied English as a Second Language. The mixed design of research included qualitative and quantitative processing of the data obtained and the data analysis comprised manual calculations.*

**Keywords:** *English as a Second Language, English as a university discipline, English language classroom, higher education, soft skills, soft skills development, students, university, university discipline.*

## **Introduction**

The present-day globalised world is becoming more dynamic and soft skills become one of the main factors that enable people to participate actively in all aspects of life in it. Moreover, the majority of present-day researchers believe that in today's workplace soft skills are of paramount importance and their importance is steadily increasing due to globalisation processes, ongoing advances in technology and changes on the labour market (Barakat & Shekh-Abed, 2023; Dall'Amico & Verona, 2015; Malykhin, Aristova, Kalinina & Opaliuk, 2021).

Education provided in different types of educational institutions and learning environments is regarded as “the great equalizer and the great enabler” (United States Agency for International Development [USAID], 2018), as it enables students to gain knowledge and skills they need, to get better employment opportunities and to unleash their potential. The acquisition of various soft skills while studying at university gives young people the opportunity to be more resistant to social challenge, on the one hand, and more adaptive and more willing to embrace labour market challenge, on the other hand. Literature analysis clearly demonstrates that many universities all over the world are still more oriented towards shaping students' subject matter knowledge and skills. It means that although they recognise the importance of equipping students with industry-required soft skills, they do not regard this problem comprehensively and systematically.

In our research we fully agree with the ideas expressed in the document “Cross-Country Survey on Soft Skills Mostly Required by Companies to Medium/High Skilled Migrants: Methodological Approach for a Common Framework of Soft Skills at Work” (Dall'amico & Verona, 2015) which can be summarised in the following statements: soft skills represent the working style of any employed person; soft skills make any employed person unique; soft skills are strategic as they empower people to promote themselves in a proper way to find better jobs and make unique contributions to the development of any company.

Although the formation and further development of students' soft skills at higher education institutions may occur via workshops, seminars or other training sessions, the best results can be achieved by integrating required soft skills into the curriculum through incorporating specially designed activities and assignments (Barakat & Shekh-Abed, 2023; Malykhin, Aristova & Opaliuk, 2023a; Malykhin, Aristova & Opaliuk, 2023b; Rao, 2019). It should be mentioned, that many researchers believe that English as a university discipline contributes greatly in developing soft skills among students, since activities which are used in the English language classroom help students be active, interact with each other and learn by doing (Rao, 2019). Taking into account the fact that in many Ukrainian universities English is taught for four years (2 years –English as

a Second Language and 2 years – English for Specific Purposes), we may assume that the role of English as a university discipline in shaping and developing students' soft skills is significant as it has great didactic potential. But do students recognise the potential of English as an effective medium in developing their soft skills? And how do students perceive the importance of soft skills aimed at preparing them to meet unpredicted challenges in today's globalised world. These are the main questions which are of interest to our study.

## **Literature Review**

### *Soft Skills*

Literature analysis promotes diverse definitions of soft skills and approaches to categorise them. Moreover, in many documents soft skills are identified with transferable skills, 21<sup>st</sup> century skills or socio-emotional skills (United Nations Children's Fund [UNICEF], 2019; USAID, 2018).

In the document "Global Framework on Transferable Skills" (UNICEF, 2019) soft skills are synonymous with transferable skills and are defined as skills that "allow young people to become agile, adaptive learners and citizens equipped to navigate personal, academic, social, and economic challenges (UNICEF, 2019). The list of soft skills which enable young people to succeed in the ever-changing world include "problem solving, negotiation, managing emotions, empathy, and communication and support crisis-affected young people to cope with trauma and build resilience in the face of adversity" (UNICEF, 2019).

According to USAID (2018), soft skills are regarded as "cognitive, social, and emotional skills, behaviors, and personal qualities that help people to navigate their environment, relate well with others, perform well, and achieve their goals". To help young people "become healthy, productive, included, and engaged individuals" (USAID, 2019), they have to be equipped with higher-order thinking skills (problem solving, critical thinking, decision-making), self-control skills (delay gratification, impulse control, directing and focusing attention, managing emotions, regulating behavior), social skills (respecting others, using context-appropriate behavior, resolving conflict), communication skills (oral, written, and non-verbal communication) and positive self-concept skills (self-confidence, self-efficacy, self-awareness and beliefs, self-esteem, well-being and pride).

Dall'Amico & Verona (2015) provide an extended definition of the concept of soft skills. According to researchers, soft skills are regarded as "... a set of non-technical skills and knowledge that underpin successful participation in work. They are non-job specific and closely connected with personal attributes and attitudes (confidence, discipline, self-management...), social (communication, team working, emotional intelligence...) and management abilities (time keeping, problem solving, critical thinking...). Due to a certain level of intangibility, some of them are rather difficult to be quantified and developed". Dall'Amico & Verona



(2015) group soft skills into three categories which contain some micro-skills, namely, navigating the world of work (identifying work goals, learning to learn, adaptability and flexibility, motivation, recognizing and applying work protocols and values, respecting hierarchical levels and rules, managing responsibilities, time management, managing the digital process), social skills (communication skills, managing the communication circle, stress management, team working, service skills, leadership, conflict management, cultural awareness) and achieving results (decision making, problem solving, creativity and innovation, critical and structures thinking).

In 2009 Wats & Wats conducted a study aimed at finding out the most important soft skills in students' views. The study enabled researchers to distinguish the following soft skills, namely, communication skills, problem solving skills, leadership skills, team work skills, IT skills and learning to learn skills.

Barakat & Shekh-Abed (2023) are convinced that people who have a fairly high level of soft skills, have more opportunities to achieve success in their personal and professional lives. Researchers explain that soft skills enable people to "...become more effective problem-solvers, decision-makers, and collaborators...". In their conclusions researchers state that such soft skills as active listening, empathy and collaboration have to be developed at universities as they enable future entrants into the labour market "to identify and address systemic problems and work towards sustainable solutions" (Barakat & Shekh-Abed, 2023).

Vandeweyer (2016) points to an interesting fact that employers and new entrants to the labour market often have a different perception of how well-developed young people's soft skills are and states that young people tend to overestimate their soft skills. As Vandeweyer (2016) mentions the purposeful formation of soft skills should start in childhood and combine efforts of parents and educational institutions. As for schoolchildren, Vandeweyer (2016) is convinced that soft skills development can be integrated across all school subjects.

In 2023 World Economic Forum (2023a; 2023b) proposed its classification of the most demanded skills on the global labour market in 2023. This classification consists of five skillsets each consisting of one or more subskills, namely, cognitive skills (analytical thinking and creative thinking), self-efficacy skills (resilience, flexibility and agility, motivation and self-awareness, curiosity and lifelong learning, dependability and attention to detail), management skills (quality control), technological skills (technological literacy) and working with others skills (empathy and active listening, leadership and social influence).

Taking into account that the lists of soft skills are constantly changing and soft skills classifications provided by present-day researchers and practitioners vary greatly, our questionnaire is based on the ten top soft skills identified by World Economic Forum (2023a; 2023b). Thus, the present research is aimed at

finding out students' perspectives on the importance of soft skills identified by World Economic Forum 2023 in their future work and the role of English as a university discipline in soft skills development.

## **Research Methodology**

### *Research Tools*

To achieve the aim of the study, the researchers developed a questionnaire which included a combination of close-ended and open-ended questions and items on a 5-Likert scale (1 – very unimportant, 2 – unimportant, 3 – neutral, 4 – important, 5 – very important). Such a combination of questions enabled researcher to get both quantitative data form respondents and more specific information on the problem discussed.

The questionnaire included the following questions:

*Do you have any work experience?*

*Do you believe that university training and university curricular programmes should be aimed at developing both hard and soft skills among university students? Please, explain your response.*

*Do you agree that English as a discipline promotes the development of soft skills among university students? Please, explain your response.*

*What activities aimed at developing soft skills in the English language classroom, in your opinion, are effective?*

### *Data Collection Procedure*

Data collection lasted for four months and took place in September-December 2023 among first- and second-year students of Kyiv National University of Technologies and Design. To select the research sample, the researchers used a convenience sampling technique. The questionnaires were distributed by hand from researchers to first- and second-year students who studied English as a Second Language. In order to receive more truthful information, respondents were informed that their participation was voluntary and anonymous. Although 179 students agreed to participate in the survey, 13 questionnaires were rejected due to the fact that they were not completely filled.

### *Study Sample*

The study sample consisted of 166 first- and second-year students who studied English as a Second Language at Kyiv National University of Technologies and Design. 104 respondents (62.70%) were male and 62 respondents (37.30%) were female.

### *Methods of Analysis*

The mixed design of research included qualitative and quantitative processing of the data obtained and the data analysis comprised manual calculations. To describe the variables, the researchers used percentages (%), means ( $\bar{x}$ ) and standard deviations (SD). Respondents' perspectives on the

importance of selected soft skills were measured from 'very unimportant' to 'very important' based on the 5-Likert scale intervals presented in Table 1.

*Table 1 Internal Level of 5-Likert Scale (made by authors)*

Mean Interval	Perspective
1.00–1.80	<i>Very unimportant</i>
1.81–2.60	<i>Unimportant</i>
2.61–3.40	<i>Neutral</i>
3.41–4.20	<i>Important</i>
4.21–5.00	<i>Very important</i>

The researchers made an equal contribution to the research and writing of the article (all authors of the article were involved in distributing the questionnaires among the students, processing data obtained, displaying the obtained data in the form of tables and figures and making general conclusions).

## Results

The results regarding respondents' perspectives on the importance of soft skills identified by World Economic Forum (2023a; 2023b) are presented in Table 2.

*Table 2 Respondents' perspectives on the importance of soft skills for future work (made by authors)*

Soft Skills	Variables					$(\bar{x})$	Overall ranking	Importance level	SD
	1 (N)	2 (N)	3 (N)	4 (N)	5 (N)				
Creative Thinking	0	0	9	74	83	4.45	4	Very important	0.49
Analytical Thinking	0	4	20	66	76	4.29	6	Very important	0.33
Resilience, Flexibility and Agility	0	0	26	69	71	4.27	7	Very important	0.32
Motivation and Self-Awareness	0	0	33	64	69	4.22	8	Very important	0.32
Curiosity and Lifelong Learning	0	0	15	54	97	4.49	3	Very important	0.36
Dependability and Attention to Detail	2	14	30	55	65	4.01	10	Important	0.30
Quality Control	0	7	37	58	64	4.08	9	Important	0.37
Technological Literacy	0	0	5	51	110	4.63	1	Very important	0.38
Empathy and Active Listening	0	3	23	62	78	4.30	5	Very important	0.33
Leadership and Social Influence	0	0	6	50	110	4.62	2	Very important	0.38

n=166

Thus, the obtained results show that the list of soft skills which are ranked by respondents as very important include ‘technology literacy’ ( $\bar{x}=4,63$ ,  $SD=0.38$ ), ‘leadership and social influence’ ( $\bar{x}=4,62$ ,  $SD=0.38$ ), ‘curiosity and lifelong learning’ ( $\bar{x}=4,49$ ,  $SD=0.36$ ), ‘creative thinking’ ( $\bar{x}=4,45$ ,  $SD=0.49$ ), ‘empathy and active listening’ ( $\bar{x}=4,30$ ,  $SD=0.33$ ), ‘analytical thinking’ ( $\bar{x}=4,29$ ,  $SD=0.33$ ), ‘resilience, flexibility and agility’ ( $\bar{x}=4,27$ ,  $SD=0.32$ ), ‘motivation and self-awareness’ ( $\bar{x}=4,22$ ,  $SD=0.32$ ). The respondents rank the following soft skills as important, namely, ‘quality control’ ( $\bar{x}=4,08$ ,  $SD=0.37$ ) and ‘dependability and attention to detail’ ( $\bar{x}=4,01$ ,  $SD=0.30$ ). The average of selected soft skills is 4.34 ( $\bar{x}$ ), it means that respondents regard them as very important for their future work.

Figure 1 visualises the results concerning students’ perspectives on the importance of soft skills identified by World Economic Forum (2023a; 2023b) for their future work.

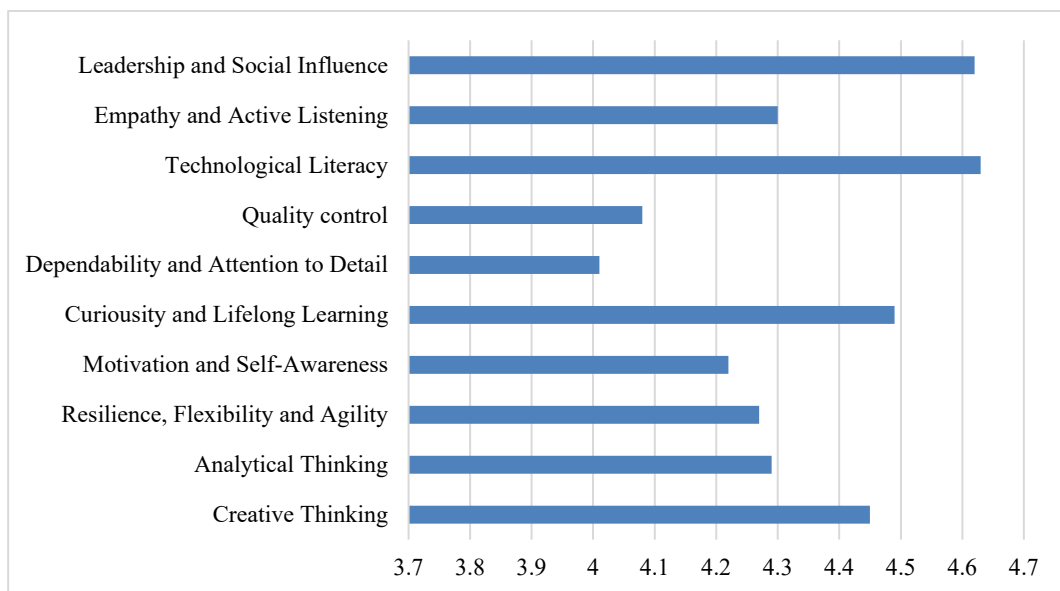
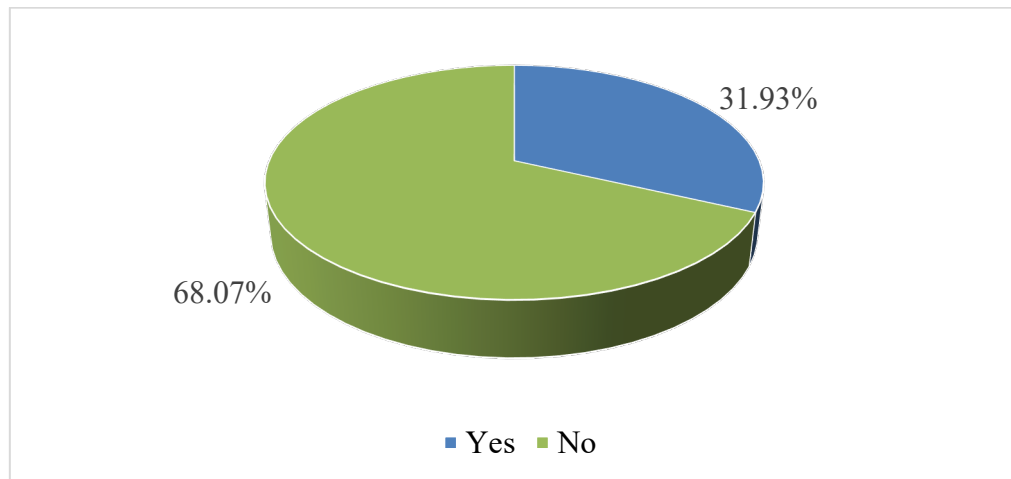


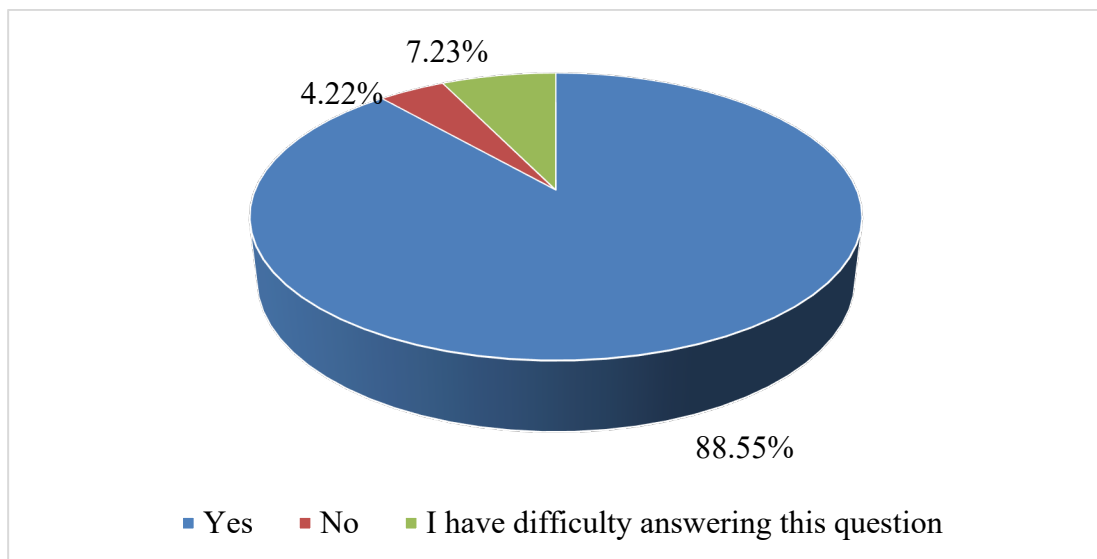
Figure 1 **Ranking of Soft Skills by Respondents** (made by authors)

Figure 2 presents the results concerning the first question “Do you have any work experience?”. 53 respondents (31.93%) indicated that they had some work experience and 113 respondents (68.07%) replied negatively. Students who have some work experience understand the importance of soft skills and realise what soft skills are required on the labour market. Despite the fact that the majority of respondents do not have any work experience, we can suggest that present-day first- and second-year students are aware of requirements expected by employees and personal and professional qualities they have to possess in order to be competitive on the labour market.



*Figure 2 Respondents' responses to the question about their work experience (made by authors)*

Figure 3 displays the respondents' responses to the question “Do you believe that university curricular programmes should be aimed at developing both hard and soft skills among university students?”



*Figure 3 Respondents' responses to the question about university curricular programmes and their orientation towards the development of both hard and soft skills among university students (made by authors)*

The results obtained enable us to claim that the majority of respondents (88.55%) strongly believe that university training as a whole and university curricular programmes should prepare students to show appropriate knowledge and expertise in the area of their specialisation and to be adaptive in different challenging situations. Responding to this question they explained that the acquisition of required soft skills in the workplace would take some time and this

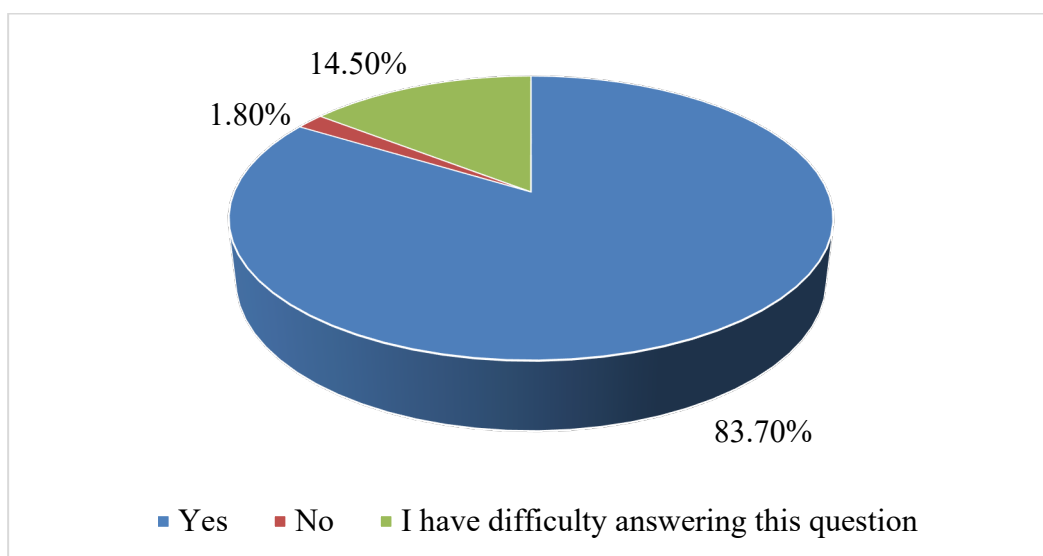
might adversely affect the performance of work and their treatment as professionals. The following excerpts from respondents' replies demonstrate their opinions on the question:

S17: ... *After training at university, I am going to start working and will definitely need both hard and soft skills to succeed in the workplace. I do believe that soft skills have to be shaped and developed at school and university and they will be improved at work.*

S97: *Of course, the development of soft skills should be obligatory in the educational process. These skills are incredibly useful in our future profession, whatever it may be. Soft skills are also useful in the learning process, as they enable us to learn the educational material better and increase the likelihood of using it in the future.*

S101: *University education should promote the development of soft skills among students. Soft skills, such as analytical and creative thinking, technological literacy, empathy and active listening help students to solve problems, set goals and adapt to changes in today's world. They both contribute to our personal development and prepare us to meet challenges in various areas of life and career.*

The results concerning the respondents' perspectives on the importance of English as a university discipline in developing soft skills among university students are given in Figure 4.



**Figure 4 Respondents' perspectives on the importance of English as a discipline in developing soft skills among university students (made by authors)**

As the Figure 3 shows the majority of respondents (83.70%) are aware of the importance of English as a discipline in developing soft skills. The respondents explain that they do believe that a wide range of activities which English language

teachers usually use in their classrooms are aimed at developing both English language skills (oral and written communication skills) and soft skills.

The results regarding the respondents' perspectives on effectiveness of activities aimed at developing soft skills in the English language classroom are presented in Table 3.

*Table 3 Respondents' perspectives on effectiveness of activities aimed at developing soft skills in the English language classroom (made by authors)*

Types of activities	Responses	
	Number	Percent
Writing written works (short stories, compositions, essays, creative writing, etc.)	122	73.49
Writing self-analysis essays	97	58.43
Writing reflexive essays	102	61.45
Role plays	126	75.90
Games	141	84.94
Discussions and debates on various topics	117	70.48
Individual projects on various topics	77	46.39
Group projects on various topics	129	77.72
Self-doings activities on various topics	137	82.53
Critical analysis of texts on various topics	93	56.02
Critical analysis of video materials on various topics	106	63.86
Research activities (participation in conferences, writing abstracts, etc.)	75	45.18

n=166

As is evident from the results obtained, English as a university discipline has huge potential in developing soft skills among university students. Here is one of the excerpts from respondents' replies on effectiveness of activities aimed at developing soft skills in the English language classroom:

S34: ... *Such activities which include critical analysis of texts and video materials, discussions and debates, writing self-analysis and reflexive essays, research activities are an important element of the educational process and can be used in various disciplines. But, in most cases, all of them are used in the English language classroom. The use of these activities contributes to the development of analytical and creative thinking, communication skills, and, what is most important, motivates us to participate in the learning process more actively. During our English language classes, we learn to analyse various information, think independently and not to be afraid of challenges. In my opinion, role plays are amazing. They help us to see ourselves with new eyes...*

Thus, the usage of a wide range of activities enables English teachers to turn their students into curious, highly motivated and reasonable professionals who want to live effectively and benefit companies they work for. English, in this case,

becomes an effective medium for improving students' English language proficiency and developing their soft skills.

### Conclusions

The present research is aimed at finding out students' perspectives on the importance of soft skills for success in their future work and the role of English as a university discipline in soft skills development. The findings suggest that although the majority of respondents do not have any work experience, they are aware of requirements expected by employees and personal and professional qualities they have to possess in order to be competitive on the labour market. Based on the research results we can conclude that the respondents rank technology literacy, leadership and social influence, curiosity and lifelong learning, creative thinking, empathy and active listening, analytical thinking, resilience, flexibility and agility, motivation and self-awareness as very important and quality control, dependability and attention to detail as important. Explaining that the lack of soft skills may adversely affect the performance of work, the majority of respondents are convinced that university training therefore should be aimed at both preparing students to show appropriate knowledge and expertise in the area of their specialisation and to be adaptive in different challenging situations at the workplace.

Moreover, the obtained results clearly demonstrate that all the respondents believe that to develop soft skills in the English language classroom, English language teachers should use various activities. Among the most effective activities aimed at developing soft skills the respondents point out the use of discussions and debates, games, role plays, individual and group projects, different types of essays, research activities etc. It enables us to claim that the purposeful use of the entire spectrum of identified activities offers great opportunities for implementing various interactive methods and techniques of teaching and learning in the English language classroom aimed at improving students' English language proficiency, on the one hand, and developing their soft skills, on the other hand. Thus, taking into account the results obtained we can affirm that English as a university discipline has great didactic potential in shaping and developing students' soft skills.

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# PROSPECTIVE TEACHERS' PERSPECTIVES ON PEDAGOGICAL CHALLENGES EXPERIENCED DURING WORK-BASED LEARNING

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**Abstract.** *This study investigates prospective teachers' perspectives regarding pedagogical issues and evaluates their readiness to address these challenges during instructional practice. The research investigates the experiences and perspectives of 67 students currently enrolled in teacher education programmes by employing a narrative content analysis methodology. The results point to several significant areas of concern among prospective teachers. Initially, classroom management emerged as a primary challenge, with many students expressing anxiety about efficiently managing diverse classroom dynamics and maintaining discipline. This problem indicates the need to pay more attention to classroom management strategies in study courses. Furthermore, the findings emphasize difficulties in effectively differentiating instruction to meet the diverse needs of learners. It was indicated that there is a need for more concentrated training in inclusive teaching methods since students voiced worries about their capacity to adjust teaching approaches to accommodate a variety of learning styles and abilities. The study suggests that prospective teachers are generally enthusiastic about their future careers but also recognize significant pedagogical challenges. To properly prepare future educators for the realities of the classroom, these findings have implications for teacher education programmes. They indicate a need for a more specific focus on practical skills such as classroom management and inclusive teaching practices.*

**Keywords:** *pedagogical challenges, preservice teachers, professional competence of teachers, work-based learning.*

## Introduction

Special attention should be provided to new teachers in order to prevent them from experiencing overload and the risk of professional burnout while they have just begun their careers. In the educational environment of the 21st century, schools and all teachers confront many obstacles. The active practice of students in educational institutions, studies based on the work environment, modelling and analysis of situations should therefore receive a great deal of attention in teacher education programmes. This is done to prepare students as effectively as possible for the ever-changing educational environment, the potential hurdles that may occur, the solutions to those challenges, and the various types of situations that

may arise during the learning process at school. According to Ward and McCotter (2004), students enrolled in teacher education programmes ought to be given the chance to meaningfully analyse their practice and circumstances that they believe to be problematic.

This research explores prospective teachers' perspectives on the pedagogical challenges they face during their work-based learning experiences in teacher education programs. In addition, this study seeks to investigate the effects of these pedagogical challenges on prospective teachers' professional development and teaching efficacy. Through this comprehensive analysis, the research aspires to formulate targeted recommendations. These suggestions are intended to enable teacher education programs to strengthen their support systems, improving the ability of future teachers to overcome these problems and promoting their professional development more effectively.

To achieve the aim and tasks outlined above, the study will address the following research questions: What pedagogical challenges do prospective teachers identify as significant during their work-based learning experiences? How do prospective teachers perceive their readiness to tackle these pedagogical challenges within their instructional practices? How do the identified pedagogical challenges affect prospective teachers' professional development and teaching efficacy? What specific strategies and improvements do prospective teachers suggest for teacher education programs to better prepare them for addressing these challenges? By addressing these research questions, the study aims to contribute valuable insights into the preparation and support of prospective teachers, ultimately enhancing the quality of education delivered in classrooms.

### **Literature review**

Society expects new teachers to be fully prepared for practical work at school after graduation. It is indicated that new teachers have good theoretical knowledge, but they lack the readiness to solve real pedagogical problems to overcome challenges in the dynamic and changing educational environment (Newberry & Allsop, 2017; Smets & Struyven, 2020; Karlberg, & Bezzina, 2022; Ndebele et al., 2023). Teacher education programs play a significant role in building the professional competence of new teachers in order to develop the skills necessary for effective teacher activity in school (Sandholtz, 2011; Caena, 2014; Barak, 2017; Āboltiņa, et al., 2024). During the study process, during pedagogical practice, and in work-based studies, future teachers have the opportunity to see real problems in school life and offer solutions to them that help to overcome the gap between theory and practice (Kennedy, 2016; Yuan, & Lee, 2016; European Commission, 2017; Šūmane, & Āboltiņa, 2023, Hamaidi, et.al., 2014). Teacher education aims to acquire the necessary knowledge in practice, so that a professional teacher can implement effective learning.

One of the requirements of the modern educational environment is the transition to the competence-based approach in education, which takes place at all levels of education, including teacher education (Makovec, 2018; Šteinberga & Kazāka, 2018; Mulder, 2019). The teacher's professional competence is a process-oriented concept. It means that the professional has basic theoretical knowledge about every subject of the educational content, practical skills, and certain attitudes and values (Caena, 2014). A teacher's professional competence determines his or her readiness and ability to perform professional activities optimally and responsibly in the changing social and professional environment (Hsieh, 2016; Lāma et al., 2023); critical thinking is an essential component of it (Bartolomé, 2004; Lithoxoidou, & Georgiadou, 2023). The ability to think critically for future teachers is included in the study process, as it will help to build their problem-solving, analysis, and understanding skills (Bartolomé, 2004). A critical attitude towards professional practice and innovations based on theory and professional dialogue is a basic skill of a teacher's professional competence. A teacher is a reflective agent capable of developing professional thinking and discourse about contextual issues and experiences (Caena, 2014). The study process based on critical constructivism promotes socially transforming, self-determined learning, which is aimed at improving the student's critical judgement and interest in the realisation of social changes (Rubene, 2006; Pnevmatikos et al., 2023)

In the study process, critical thinking strategies and tasks are used for solving challenges seen in school practice: analysis of theoretical questions, situational research in school practice, and solutions based on theory and practice. When analysing problem situations, obstacles to achieving the goal are analysed, hypotheses are put forward, and solutions are chosen; in practice-based studies, it is possible to implement them and assess to what extent the goal has been achieved (Cruickshank, 1986; Bartolomé, 2004).

In today's educational environment, when teachers are challenged daily to develop new, effective approaches to teaching practice, the teacher becomes a designer (Norton & Hathaway, 2015; Henriksen, & Richardson, 2017). D. Laurillard claims that teaching in the 21st century is a science of design (Laurillard, 2012). The concept of design thinking is useful in the everyday life of educators to solve pedagogical problems strategically and systematically. Design thinking is based on formulating and solving complex problems through an analytical and creative process (Calavia et al., 2023). Therefore, teacher preparation programs must use the approach of design disciplines (design principles, design processes, technology affordances, design patterns, and design-based research), where prospective teachers are involved in identifying practical problems, theoretical literature analysis, information selection, assessing its relevance to the situation, developing solutions to the problem, and prototype testing (Norton & Hathaway, 2015; Henriksen, & Richardson, 2017; Calavia et al., 2023).

In work-based study programs, it is also possible to prototype the proposed solutions, improve them, and implement the most effective approach in practice. Teachers who use a designer's approach to solving problems take on bigger and more complex challenges, increasing teachers' curiosity and creative activity in practice (Lockwood, 2010), significantly improving the teacher's effectiveness in overcoming challenges. To prepare university students for the work environment, developing their professional autonomy is necessary, reducing the gap between students' theoretical learning and practical professional activity (Oļesika & Rubene, 2023).

The practicums, practice at school, and work-based studies included in the study programs of future teachers ensure the development of knowledge, skills, and competencies of future teachers according to the real needs of the work environment (Margevica-Grinberga & Odina, 2021; Ndebele et al., 2023). Research on the challenges of future and new teachers in pedagogical work says that the most important challenges of new teachers are related to promoting students' motivation, improving learning, and thinking skills, technology use, inclusive education, and classroom management (Hurlbut & Tunks, 2016; Sujadi, et.al., 2019; Ray et.al, 2023). Developing the habits of thinking and acting related to the design approach to problem-solving can help new teachers become more flexible in assessing and dealing with challenges, better adapting to the profession.

## **Methodology**

The study utilized narrative content analysis, drawing upon the foundational work of researchers such as Riessman (2008) and Lieblich, Tuval-Mashiach, and Zilber (1998), who have significantly contributed to the narrative analysis field. This approach is particularly suited for exploring individuals' intricate emotions and perspectives, offering deep insights into their personal and professional challenges. The research examined the experiences and viewpoints of 67 students currently enrolled in teacher education programs, employing initial thematic coding to distill key themes from their narratives. Narrative data were collected from the participants, focusing on their reflections regarding pedagogical challenges encountered during work-based learning experiences. The analysis of the data was carried out through NVivo 14. Initial thematic coding was applied to the collected narratives to identify key themes related to pedagogical challenges and potential solutions. This process involved a detailed examination of the narrative texts, facilitating the extracting and categorizing of significant themes and patterns within the data. The identified themes covered a broad spectrum of issues, including classroom management difficulties, diverse student literacy levels, concerns over national educational performance, and the necessity for effective teaching strategies to enhance literacy and reading skills. As delineated by Braun and Clarke (2006), this coding process entails a meticulous examination and organization of

data to unearth patterns and themes emerging from the narratives. In alignment with Saldaña's (2009) emphasis on the importance of iterative coding for refining themes and ensuring analytical depth, the study conducted further analysis to refine the initial codes. This involved associating specific quotes from the narratives with refined codes, thereby enriching the understanding of the challenges described by prospective teachers. This methodological approach enabled a comprehensive exploration of prospective teachers' perspectives, illuminating the complexities of their work-based learning experiences and the consequent implications for teacher education programs. Thus, narrative content analysis serves as a pivotal foundation for generating insights into the pedagogical challenges faced by future educators and identifying potential strategies for addressing these issues within teacher education courses.

The data is finally organised into five main themes: discipline, inclusive education, motivation to learn, literacy, and engagement. Within these themes, there are a total of 24 codes and 43 sub-codes. (See Table 1).

*Table 1 Overview of Pedagogical Challenges Identified by Preservice Teachers, Divided into Themes, Codes, and Subcodes (made by Authors)*

Main themes (Frequency)	Codes	Sub-codes (Frequency)
Discipline (n=19)	Classroom management Self-discipline Significance of pedagogy	Anxiety (n=5) High noise level (n=3) Disobedience (n=3) Healthy and productive learning (n=2) Classroom management strategies (n=11) Lack of motivation (n=7) Social factors (n=4) Adolescent age (n=2) Mentor program (n=3) Cooperation (n=6)
Inclusive education (n=17)	Differentiation Special needs Minorities Teacher and curriculum effectiveness	Learning styles and abilities (n=9) Support system (n=8) Large number of students in the class (n=5) Parental involvement (n=4) Information technologies (n=5) Resources (n=8) Personalized learning (n=2)
Motivation to learn (n=15)	Motivation to learn mathematics Co-responsibility Teacher's personality Creativity Motivation through cooperation	Learning materials (n=8) Teaching methods (n=6) Self-confidence (n=5) Belief in one's own abilities (n=2) Learning environment (n=7) Digital solutions (n=7) Creative classes and activities (n=3) Support systems (n=3)

		Self-directed learning (n=5) Supportive language (n=2)
Literacy (n=9)	Reading aloud Reading speed Reading comprehension Reading Reading Difficulties Writing Literacy level differences	Strategies/methods (n=7) Regularity (n=5) Dysgraphia (n=1)
Engagement (n=7)	Learning environment Learning habits Active learning Involvement Teaching-learning environment	Gamification (n=2) Homework (n=2) Teaching methods (n=7) Planning (n=3) Evaluation criteria (n=2) Group work (n=5) Technology-enriched learning environment (n=4) Supportive environment (n=6) Noise (n=3) Optimal number of students in a class (n=3) Communication-friendly classroom (n=2) Breaks (n=2) Acoustics and ergonomics (n=1)

## Results

The narrative content analysis of 67 students who are currently enrolled in teacher education programs revealed five main themes, each accompanied by illustrative quotes from the participants, which elucidate the depth and variety of pedagogical challenges faced by prospective teachers, especially in discipline, inclusive education, motivation to learn, literacy, and engagement. The five main themes represented the prospective teacher's ideas about the importance of pedagogy and the challenges and opportunities their students face.

The discipline emerged as a significant challenge, as prospective teachers struggled to maintain discipline in the classroom and create a favorable learning environment. The data highlights instances of anxiety, high noise levels, and disobedience among students. This theme underlines the necessity of using effective classroom management strategies to successfully handle behavioural problems and create an environment of self-control and mutual respect.

Inclusive education was another critical area of concern. The findings reveal the difficulties in implementing differentiation strategies and addressing the needs of special needs students and minorities. Challenges such as managing large class

sizes, ensuring parental involvement, and leveraging digital technologies for personalized learning point to the need for strong support systems and resources for teachers to effectively address the diverse needs of their students.

The motivation to learn theme examines the factors influencing students' engagement and enthusiasm towards learning. Key factors identified include the teacher's personality, the use of creative and cooperative learning strategies, and the integration of digital solutions. This theme emphasizes the importance of fostering a positive learning environment that encourages student participation and self-directed learning.

Literacy challenges encompass difficulties related to reading aloud, comprehension, and writing. Prospective teachers reported varied student literacy levels, highlighting the need for tailored instructional approaches to improve reading and writing skills. This theme points to the critical role of literacy in academic success and the necessity for targeted interventions to address gaps in students' abilities.

Upon analysing the narratives, it was found that the majority of the respondents were in favour of pedagogical teaching methods. A research study by Itow (2020) stated that pedagogy is important because it enables teachers to establish better teaching practices for students in their classrooms. It allows them to understand better how students learn by fulfilling their learning needs. As a result, these practices improve teaching experiences and the student's learning abilities. With regards to the response by (R-12), similar viewpoints were achieved:

*“Regular work with the text (literacy), promoting the improvement of reading skills and understanding of the read text” (R-12)*

Another respondent mentioned,

*“As a result of the pilot processes of the activities described above, the improvement of the student's reading skills and the overall growth of the quality of the learning processes are noticeable. This resulted in the improvement of individual students and class's average results in tests during the first semester” (R35)*

The above responses have indicated that the teachers have also experienced better learning outcomes after implementing pedagogical practices. In contrast, the study by Nurdiana et al. (2023) suggested that educators' pedagogical analysis is a crucial tool for identifying areas of improvement, facilitating collaboration, assessing learning outcomes, and enhancing accountability. Regarding response 12, it was found that teachers believe that the use of pedagogical practices has potential outcomes in improving the reading and understanding of the students. The US Department of Education has indicated a relationship between pedagogy and the concept of discipline and mentioned that pedagogy is an interdisciplinary approach that functions as a science or theory for teachers to bring academic discipline and practice (Wyse, 2020). Similarly, respondent 5 mentioned during their interview that,



*“And if the means, i.e., our work brings joy and satisfaction, then it is nice to see purposeful and knowledgeable students next to you. Discipline in the classroom” (R-5)*

Another respondent has shared their viewpoint that,

*“In general, I assessed the class as very undisciplined, initially with a provocative attitude towards me” (R-54)*

The above-presented responses show two different perspectives. Response 5 showed that with the implementation of the pedagogical practices in the classroom, the students have shown a more disciplined attitude in their classrooms. Response 54 showed that the teachers had found an undisciplined classroom environment, indicating the need to improve teaching methods and utilize a pedagogical teaching environment. In contrast, according to the study by Ball (2023), discipline-specific pedagogy is a method and teaching practice that encompasses discipline-specific knowledge and engaging students to bring improvements in their learning attitudes. In conclusion to overall responses, it is found that the participants were satisfied with using pedagogical teaching practices to improve students' learning abilities and create a disciplined classroom environment. It further indicated that teachers were more satisfied with these teaching approaches and have not stated any severe challenges in adopting them.

The engagement theme focuses on strategies to enhance student involvement in the learning process. Factors such as the physical learning environment, active learning techniques, and the use of gamification and technology-enriched activities positively impacted student engagement. This theme suggests that adopting innovative teaching methods and creating a dynamic, interactive classroom atmosphere can significantly improve student learning outcomes.

Regarding the Glossary of Education Reform, students' engagement is defined as the degree of attention, optimism, interest, and passion that shows their willingness to learn (Barkley & Major, 2020). In addition, a study by Bowden et al. (2021) stated that students' engagement in their learning and education is a positive approach to enhancing their educational experiences. On the other hand, regarding the student's engagement in the classroom and the pedagogical practices, respondent 42 stated,

*“By promoting positive attitudes and camaraderie in the classroom environment, the Drake method strives to create a safe and supportive environment where students can feel comfortable and included” (R-42)*

Also, respondent 3 stated,

*“Teachers can promote positive attitude and motivation by using supportive language and invitations such as “I believe in you”, “you can do it”. Foster self-confidence and self-motivation so that students feel competent and ready to learn” (R-3)*

The responses indicated that the use of pedagogical teaching practices by the teachers has resulted in positive relationships among the students in the classroom

and with teachers and their families. Respondent 42 promoted the use of the Drake method for better student outcomes. The study by McBrady (2022) similarly stated that the Drake method enables educators to recognize the gaps between expert thinking and novice learning by uncovering tacit knowledge. The main purpose of these contemplative pedagogies is to involve new teaching methods for cultivating deepened awareness, valuable insights, and concentration toward lessons (Chapman, 2021). These methods have shown improved engagement of the students in the classroom and their enhanced participation in learning. The respondent 28 stated,

*“Student engagement can be divided into three interrelated forms: behavioural, emotional and cognitive”* (R-28)

The above-mentioned response has shown that the pedagogical practices by the teachers resulted in improving students’ engagement along with their learning behaviour, and cognitive and emotional skills. Similarly, respondent 19 also quoted that,

*“Also, students' critical thinking and problem-solving ability develop. Group learning can increase motivation and engagement”* (R-19)

It means that there is a positive association between pedagogy and students’ learning, indicating that the teachers have found the least or no challenges in involving students and changing their teaching methods from traditional to pedagogical practices.

This theme is significant in addressing the main objectives of this research as it pays attention to the issues and challenges associated with the pedagogical teaching approaches. Respondent 10 stated that:

*“Technology-enriched learning environment in chemistry classes to improve student motivation.*

*The low level of motivation of students in chemistry lessons. Many students are not interested in studying chemistry because the exam in this subject is not mandatory, the stories heard about the subject of chemistry are not enticing, and the public perception of chemistry is depressing.”* (R-10)

This response has indicated two main aspects: there is a need for advanced teaching practices as the students find no interest in participating in learning in the chemistry classroom. Likewise, another response showed:

*There are several common causes of the problem, and their sequence changes over time, depending on the priorities of the given moment, both in learning processes, in the stages of educational reform, and in everyday life in families and society* (R-63)

It also validated that adopting new approaches is challenging for the students and needs better approaches to bring sustainability to the classroom environment. Concerning the student's understanding, respondent 1 stated:

*It is a potential disaster for European society because children who, after leaving school, are unable to understand even a simple written text properly, are*

*not only at risk of unemployment but are also not allowed to study further." - Androulla Vassiliou, EU Education, Culture, Commissioner for Multilingualism and Youth Affairs. (R-27)*

Another respondent stated:

*"Pupils with attention deficit hyperactivity disorder (ADHD) often have difficulty understanding what is assigned to them in class. When you have to listen to a verbally explained task, the classroom environment is not the friendliest for a child with UDHS, because various external stimuli are constantly offered that distract from what the teacher is saying" (R-27)*

The overall outcomes of these responses have indicated the need of improvement in the pedagogical curriculum as the changes in the teaching methods cause challenges for students to learn. Secondly, it also highlighted that the psychologically affected individuals find more challenges in learning and understanding the concepts than the other individuals in the classroom.

Analysing the overlap and repetition of codes across the themes of Discipline, Inclusive Education, Motivation to Learn, Literacy, and Engagement reveals several key areas of intersection that highlight the interconnected nature of pedagogical challenges in work-based learning environments. Key insights include the universal importance of a supportive learning environment, the critical role of differentiated and innovative teaching methods, the necessity of strong support systems for both teachers and learners and the transformative potential of technology in education. This interconnection of themes illustrates the complexity of teaching and the need for comprehensive training that equips prospective teachers with a diverse skill set to navigate and address these challenges effectively.

Overall, the responses and the findings of the above themes, it is found that the use of the pedagogical practices was found much more valuable as per the perceptions of the teachers, but the responses have further highlighted the need for improvement by referring to the challenges faced by the students, it is expected that the better implementation procedures and planning will establish effective classroom environment and the progressive learning growth of the students.

## **Conclusions**

The study set out to explore the pedagogical challenges identified by prospective teachers during their work-based learning experiences, assess their readiness to address these challenges, investigate the impact of these challenges on their professional development and teaching efficacy, and suggest strategies for teacher education programs to prepare them better. Drawing on the narrative content analysis of 67 teacher education students, the research revealed critical insights that address the research questions in a thorough manner. Prospective teachers identified significant challenges across five main themes: Discipline, Inclusive Education, Motivation to Learn, Literacy, and Engagement. These challenges

highlight the complex and multiple aspects of teaching, including managing classroom behaviour, responding to different learning styles, engaging students actively, and overcoming difficulties with reading and writing. The results demonstrate the complex landscape of educational challenges that prospective teachers face, requiring a holistic and multi-dimensional approach to teacher education. The narratives revealed a nuanced understanding of pedagogical issues but also indicated a gap in prospective teachers' readiness to address these challenges effectively. While there is a general enthusiasm for embracing their future roles, there is a clear need for enhanced practical training and support to navigate the identified challenges confidently. This gap underscores the importance of aligning teacher education curricula more closely with the realities of classroom teaching. The pedagogical challenges identified profoundly impact prospective teachers' professional development and teaching efficacy. The study highlights how these challenges, if unaddressed, can hinder the development of essential teaching competencies and affect the ability of future teachers to foster effective learning environments. Addressing these challenges through targeted interventions within teacher education programs is crucial for building resilience and adaptability among prospective teachers. The study suggests several strategies for teacher education programs to prepare prospective teachers better. These include a stronger focus on practical skills development, particularly in classroom management and inclusive teaching practices; enhanced technology integration in teaching and learning; and establishing strong support systems for prospective teachers. Emphasizing experiential learning opportunities, such as work-based placements, and fostering a culture of reflective practice are also recommended to bridge the gap between theory and practice. By implementing the suggested strategies, teacher education programs can enhance the quality of education delivery in classrooms and better equip future teachers for the complexities of their profession. This study emphasises the significance of a cooperative and iterative approach to teacher education, where prospective teachers' input is consistently utilized to improve the curriculum. This ensures that the curriculum remains adaptable to the changing requirements of the education sector.

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# TRILINGUAL EDUCATION IN KAZAKHSTAN AND GRADUATES EMPLOYABILITY PERSPECTIVES

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**Abstract.** *Development of trilingual education in Kazakhstan and use English as a Medium of Instruction (EMI) is a complicated process with both positive and negative sides; so it is necessary to explore EMI policy in Kazakhstani Higher Education Institutions (HEIs) and its role for graduates' employability and career prospects and opportunities through qualitative and quantitative research in order to define holistic approach to higher education in the frame of trilingual education policy and the aspects of EMI that need improvement.*

*The following subtopics will be explored during the research:*

- additional competences suggested by both regulating documents on implementation of multilingual education in HEIs in Kazakhstan and educational programs (EP) using EMI;*
- opinions of students enrolled into EP with EMI about opportunities and challenges of the programs / EMI education;*
- opinions of HEIs graduates who studied in English about opportunities and challenges of EMI education;*
- opinions of the employers of multilingual graduates about their professional skills, competences, and soft skills.*

*The main research question that our study aims to answer is: What are the implications and challenges of EMI in HEIs in Kazakhstan for the employability and career opportunities of graduates? To answer the research question, a range of methods will be used for collecting data (surveys and interviews with students, graduates and employers).*

**Keywords:** *EMI, HEI, employability, trilingual education policy.*

## Introduction

Implementation of trilingual approach into Kazakhstani education system and use English as a Medium of Instruction (EMI) is a complicated process with a variety of advantages and disadvantages; so, it is necessary to conduct the analysis of EMI policy in Kazakhstan Higher Education Institutions (HEIs) (British Council, 2024); to study its' role for graduates' future employability and career prospects in order to define holistic approach to higher education.



Trilingual education policy serves as a platform for further development of EMI in Kazakhstan system of higher education; however, there are some aspects of EMI that should be studied thoroughly, e.g. additional competences provided by educational programs (EP) using EMI; opportunities and challenges of the programs / EMI education; opinions of HEIs graduates who studied in English about opportunities and challenges of EMI education; opinions of the employers of multilingual graduates about their professional skills, competences, and soft skills.

Currently, there are four large universities in Kazakhstan with academic programs in English, according to Tajik, Akhmetova, Fillipova, Shamatov, Zhunussova (2022) and the number of universities suggesting EMI programs is growing. Therefore, it is necessary to focus on the drawbacks and advantages of such programs as well as on stakeholders' expectations and challenges faced by students, as there is a lack of empirical studies related to the above-mentioned issues.

The aim of the project is to explore English Medium Instruction (EMI) policy in Kazakhstani Higher Education Institutions (HEIs) and its role for graduates' employability and career prospects and opportunities through qualitative and quantitative research in order to define holistic approach to higher education in the frame of trilingual education policy and the aspects of EMI that need improvement.

Thus, the novelty of this research work is associated with insufficient investigation of the influence of education in English both on the educational process itself (from the position of students, their point of view on the difficulties and advantages of such learning), and on its result, i.e. on the employment opportunities of a specialist who received education in English, and on the opportunities for further career growth determined by this factor. The main approaches the researchers will use for the project are systematic and conceptual as it is planned to develop the conception of language teaching and learning influence on employability of Kazakhstan HEIs graduates, as few researchers have addressed the issue (although there is some research on the topic in foreign sources, e.g. European employment services (2021), Study on Foreign Language Proficiency and Employability Final Report (Beadle et al., 2015).

As it is a research project, we do not have the extended results at this stage of its' implementation; so, in this research paper we focused on the perspectives of our study.

## **Research Questions**

Taking into account such factors as (1) influence of foreign language skills on educational process, (2) stakeholders' expectations, the main research question that the given study aims to answer is: What are the implications and challenges

of EMI in HEIs in Kazakhstan for the employability and career opportunities of graduates?

To answer the research question, both qualitative and quantitative methods will be used for collecting data.

Thus, it is planned to use the data from interviews with employers and employer organizations, data collected by reviewing online vacancy databases in Kazakhstan; and data from a survey of employers in the process of our research project implementation.

Empirical approach will also be used as the researchers will collect empirical data and perform their statistical analysis, as well as activity approach for studying professional activity of EMI EP graduates.

## **Literature Review**

EMI is defined as “the use of the English language to teach academic subjects (other than English itself) in countries or jurisdictions in which the majority of the population’s first language is not English” (Macaro and Aizawa, 2022). The definition is widely used in literature although it received some criticism for separating English speaking and non-English speaking contexts. Otherwise, Han (2023) stated that “EMI typically happens in an English as a foreign language setting, but the object of instruction is not English per se but an academic subject such as Engineering, Biology, Medicine, Physics, and Applied Linguistics”.

Internationalization of education and the need to be competitive in a global market have led to the growing popularity of EMI in different countries. However, use of EMI may have various effects, cultural, educational, and others, in the countries where English is not the state, official or native language of the majority of the population (Dearden, 2016). One of the effects and issues at the same time might be the transformation of the personality of Kazakhstani students who study in English, but need to apply the acquired knowledge in Russian or Kazakh. There are only few studies addressing this issue, for instance the research paper by Zhunussova, Tajik, Fillipova, Antwi (2023), discusses the issue from the perspective of EMI’s impact on national and linguistic identity of students. Also, there are some studies showing the rate of students who dropped out from EMI education programs comparing to those who chose national language as a medium of instruction: “students subjected to English-medium instruction answer significantly fewer test questions correctly and drop out from the education to a much higher degree compared to the students accessing the education in the national language should give stakeholders pause and inform the continued discussion concerning the (i) advantages and disadvantages of adopting EMI, and (ii) what (pedagogical or linguistic) support might be needed to scaffold students’ learning experience in EMI” (Bälter, Kann, Mutimukwe, Malmström, 2023).

However, no research to the best of our knowledge has studied the influence of EMI on personal and professional qualities of students and graduates, and employability as well as career opportunities resulted from studying in English in Kazakhstani context.

Ability to communicate and use information in different languages is another challenge that globalization poses to university graduates. EMI programs at universities in Kazakhstan help students respond to the challenge by giving the opportunity to study profession-related content in English, at the same time improving their English. However, in this case, English is considered rather as a tool than as a subject. In other words, mastery of the English language is regarded as a by-product of attaining academic knowledge in content courses (Alfehaid, 2018).

The novelty of our study lies in the fact that this is the first attempt at an integrated study that will take into account both the interests of stakeholders and the advantages that university graduates who use English as a language of instruction have, as well as the problems they face in their professional activities. The given research will identify following things:

- To what extent can EMI develop students' competences in their field?
- How students and graduates assess the role of EMI in their professional training?
- What languages do EMI program graduates use in their work? To what extent does education received in English expand their professional competencies??
- To what extent does education received in English enhance their employment opportunities?
- What strengths and weaknesses do employers note in preparing potential employees using EMI?

So, study of various aspects of EMI is one of the challenges in the field of ELT as it is “increasingly being used in universities, secondary schools and even primary schools. This phenomenon has very important implications for the education of young people. Yet little empirical research has been conducted into why and when EMI is being introduced and how it is delivered. We do not know enough with regard to the consequences of using English rather than the first language (L1) on teaching, learning, assessing, and teacher professional development” (Dearden, 2016).

### **Why is it necessary to study EMI implementation?**

The main reasons to conduct such kind of study look as follows:

- 1) To observe ELT at the universities of the Republic of Kazakhstan within the framework of the declared trilingual strategy (including the

- study of both official documents and documentation of universities in which this strategy is being implemented);
- 2) To analyze EMI programs in order to determine their advantages and development opportunities;
  - 3) To identify the opportunities that both students and graduates of these educational programs receive in employment, as well as their potential difficulties;
  - 4) To determine the impact of English on graduates and on the perception of their capabilities by potential employers.

Currently, research has been conducted in the Republic of Kazakhstan on EMI and its impact on the personal characteristics and social status of students (Zhunussova, Tajik, Fillipova, Antwi (2023); the employment opportunities and potential benefits, as well as the difficulties experienced by graduates of these programs, have been practically unexplored, which determines the significance of our study on a national scale.

The importance of the project results lies in the fact that it plans to find out the impact of EMI on the learning process, as well as on its outcome; determine to what extent training in programs using EMI is in demand, how interested industry representatives are in training using English, as well as to what extent the expectations of graduates who studied in EP using English have been met, how competitive graduates of these EPs are and how their knowledge is applied in professional activities.

### **Research Techniques to Study EMI**

Complex research methodology will allow the research group to get more objective results through triangulation and use of statistical analysis instruments and avoid subjectivism in interpretation of research data / results. “These include the need for extensive data collection, the time-intensive nature of analyzing both text and numeric data, and the requirement for the researcher to be familiar with both quantitative and qualitative forms of research” (Creswell, 2017).

The research is interdisciplinary as it plans to

- study interrelation of content and language to understand how it affects employability and career prospects;
- study the opinions of students on EMI;
- study the opinions of employers on the advantages and disadvantages of EMI in professional / tertiary education.

The research group is also planning to perform needs analysis and analysis of the aims and means of EMI in the teaching and learning process in HEIs in Kazakhstan based on the following:

- Analysis of regulating documents on EMI for understanding how EMI is implemented in HEIs in Kazakhstan;

- Collection and analysis of data on viewpoints of the students, main stakeholders, studying in English (EMI EP students)
- Study of EMI programs' graduates' opinions about their education (opportunities, advantages, drawbacks)
- Study of employers' (important stakeholders) opinions about hiring graduates of EMI programs

The main research methods planned to be used in the project are analysis of secondary sources (regulating documents), observation, survey and interview.

Conception of Development of Higher Education and Science in Kazakhstan for 2023-2029 (Government of the Republic of Kazakhstan, 2023) states that multilingual education will continue to be implemented so that HEIs' students could fully benefit from academic exchange programs, which emphasizes the importance of the research question. EMI educational programs' graduates might also be important for globalization of companies where they will use professional knowledge acquired in English.

The research question and research objectives require using a complex of research methods, including both qualitative and quantitative, for collecting and analyzing data. Quantitative research methods will be used for analyzing primary data collected from students and graduates of EP with EMI, and qualitative research methods, for instance, content-analysis, will be used to analyze data collected through interviews with employers, students and graduates.

### **Research Population**

Five different groups of stakeholders are supposed to participate in the research. The first group of respondents includes university authorities and management like rectors, presidents, vice rectors / provosts, deans, program coordinators, and other management staff. The second group includes teaching staff (content and English), and the third group includes EMI students. Group four is EMI graduates and group five is employers.

### **Main Stages of EMI Implementation Analysis**

**The first stage** of the project will include analysis of regulating documents (state standards, government decisions / decrees, Government of the Republic of Kazakhstan, 2023, etc.), and the documents of EMI EP to determine the peculiarities of language learning and teaching and what and how the content is taught in English.

**The second stage** of the research is surveying and interviewing students to understand their needs, which will allow to determine the advantages and drawbacks of EMI. This, in turn, will help develop recommendations for a more student-centered approach to EMI.

**The third stage** includes observation, survey(s) and questionnaire(s) for graduates of EMI EP. The focus in this case will be on learning and teaching means and learning outcomes. Qualitative and quantitative analysis in this case will allow to make recommendations for more practice / job-oriented learning and teaching process.

**The fourth stage** of the project aims at surveying EMI EP graduates.

**The fifth stage** will be an in-depth interview with employers to determine their viewpoint on the advantages of EMI education of their employees, and their opinions on the need of improving particular aspects of potential employees' education, which will help develop recommendations for more practice/ job-oriented learning and teaching EMI process. The project group will use content analysis of the in-depth interviews. According to A. Voiskunovskii and S. Skripkin qualitative research is mostly about subjective interpretation of the researched phenomena and subjective opinion of the respondent, interviewee or the person being observed. Lincoln (1995), Trochim (1999) claim that subjectivity of qualitative research requires a completely different approach to the objectivity of data. They suggest using 'confirmability' as one of the parameters of objectivity / reliability of data / results. As any qualitative research is unique in the way that it is based on the personal viewpoint of the researcher(s), 'confirmability' helps assess its reliability, validity and 'replicability'. At the final stage of qualitative research data audit should be done for detecting deviations and errors in the process of data collection and analysis (Voiskunovskii, Skripnik, 2001). In this regard, triangulation of data, which provides more objective results due to use of several sources of information, and theoretical triangulation, which allows the interpretation of information from different perspectives, should be done.

Use of statistical analysis methods will allow to analyze the data collected at various stages of the research project with multiple regression methods and modeling through structured equations.

### **Ethical Concerns**

Ethical concerns will be resolved through submission of questionnaires, interview questions and participants' consents to University Ethical Committee before the data collection stage. Before the submission of the application to the Ethical Committee, project group members will have negotiations with the authorities of HEIs with EMI programs to get the consent for universities' staff and students' participation in the project. Consent letter will have the information about the aim and scope of the research, methods and procedures of data collection, risks and benefits, participants; rights and research group members' contacts. Participation in the research will be anonymous and confidential, and participants will be able to refuse to answer any questions in the process of data

collection. The participants will also have the right to require to delete any piece of information, or stop using it, or quit the project at any time.

### **Conclusion and expected effect of the study**

The results of the project will help various groups of stakeholders, in particular, the management of universities implementing EMI-based Educational Programs, as well as potential employers who might hire the graduates of these Educational Programs. They could become knowledgeable about particular strategies for implementing tri-lingualism in the classroom and for creating Educational Programs that use English as the primary language of instruction. Throughout our research boundaries, it is intended to develop recommendations for content teachers and English language teachers on conducting classes that will help in adjusting the content of disciplines using EMI, in accordance with the expectations of graduates of these Educational Programs and their employers.

As the authors tell about the project which is planned to be implemented, here is a description of the stages, research population and research techniques of prospective study.

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# MODELING THE PROCESS OF FORMING THE SKILLS AND PEDAGOGICAL ANALYSIS OF MUSICAL WORKS OF FUTURE MUSIC TEACHERS

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**Abstract.** *The article highlights the importance of the skills of artistic and pedagogical analysis of musical works for the success of piano training of music teachers. The purpose of the article is to analyze the process of modeling the skills of artistic and pedagogical analysis of musical works of future music teachers. The research used a set of methods: theoretical (analysis of scientific literature, theoretical modeling, comparison, generalization), empirical (observation, questionnaires, testing), methods of processing experimental data for the purpose of quantitative and qualitative analysis of diagnostic results. The content of the concepts: «skill», «skill of artistic-pedagogical analysis of musical works» is clarified, the purpose, task, essence, features and functions of artistic-pedagogical analysis are defined. A model of the formation of the skills of artistic and pedagogical analysis of musical works in the process of piano training has been developed, pedagogical conditions, principles and stages (cognitive-informational, value-orientational, independent-creative) of its implementation have been substantiated. The results of the empirical study showed that in the process of piano training of music teachers, the artistic and pedagogical analysis is not sufficiently updated. At individual lessons in the piano class, only its individual elements are used: biographical information, stylistic features and analogies, analysis of means of expression. Innovative technologies and methods (motivational, cognitive, interactive) of forming skills of artistic and pedagogical analysis are proposed. It has been proven that artistic and pedagogical analysis is a powerful and effective means of developing social skills (soft skills), as it allows students to be involved in various types of musical activities: artistic-cognitive, artistic-analytical, artistic-performing. The conducted research confirmed the relevance of artistic and pedagogical analysis in the process of piano training of music teachers.*

**Keywords:** *music teacher, model, musical activity, cognition, skill, artistic and pedagogical analysis, piano training.*

## **Introduction**

The relevance of the problem of modeling the process of forming the skills of artistic and pedagogical analysis of musical works of future music teachers is determined by the significant qualitative changes that are being carried out in the system of higher art education of Ukraine, the improvement of the content of educational and training programs, the creation of the latest teaching methods that take into account modern scientific developments in art pedagogy, musicology and performance experience. in accordance with the Law «On Higher Education» (Ministry of Education and Science of Ukraine, 2014), the quality of training of future music teachers must meet the high level of approved Standards and be carried out in accordance with the approved Strategy for the Development of Higher Education of Ukraine for 2022-2032 (Ministry of Education and Science of Ukraine, 2022). That is why, in the training of music teachers, it is necessary to pay attention to the analysis of theoretical and practical artistic problems, to the definition and creative application of pedagogical conditions that increase the effectiveness of the educational process in pedagogical universities. As practice shows, piano training is one of the main things in the professional development of a future music teacher. To increase its effectiveness, it is necessary to include an artistic and pedagogical analysis of musical works in the process of students' piano training. This will contribute to a more complete disclosure of the content aspects of the artistic imagery of new musical structures, their semantics, sound-timbral characteristics, etc.

The analysis of scientific literature proved that the problem of forming the skills of artistic and pedagogical analysis of musical works as one of the components of the professional training of future music teachers has not yet been comprehensively studied. Moreover, the generalization of these studies showed that a significant number of graduates of music majors of pedagogical universities are not sufficiently prepared for the implementation of artistic and pedagogical analysis of musical works. In connection with this, modeling the process of forming the skills of artistic and pedagogical analysis of musical works becomes of primary importance.

## **Literature review**

It should be noted that certain aspects of modeling the piano training of future music teachers have already been studied by one of the authors of this article. Thus, N. Mozgalova analyzed in detail the views of Ukrainian scientists on the problem of modeling in the field of music teacher training and came to the conclusion that the model is "a kind of analogue of a real object" and reflects "its most essential characteristics: purpose, tasks, content, forms and methods of organization". When creating it and determining the ways of implementation, it is

necessary not only to focus on the internal realities of higher educational institutions, but also to monitor global trends in the methods of teaching (training) music teachers. At the same time, the model provides for «variability of application, update of content, generation of new knowledge and creative elaboration of the experience of training music teachers» (Mozgalova, 2011).

The logic of the research required clarifying the content of the concepts of «skill», «skill of artistic and pedagogical analysis of musical works», definition of the essence, purpose, tasks, features and functions of artistic and pedagogical analysis. Thus, scientists consider skills from the standpoint of pedagogy, psychology (M. Vary, education theory (I. Beh), and the choice of teaching methods. According to their interpretations, skill is the readiness to solve a certain activity based on knowledge and skills (Vary 2007); the ability to perform actions according to the goals and conditions proposed by the teacher (Bondar, 1987); the ability to properly perform certain actions is based on the appropriate use of knowledge and skills acquired by a person (Goncharenko, 1997). The acquisition of skills occurs through a gradual transition from work under the supervision of a teacher to independent work, with «a significant part of mental activity aimed at finding and using the optimal way of solving tasks» (Maksimenko, 2004). As a complex integral formation that arises in the process of analytical and synthetic activity for cognition and awareness of a wide range of musical information, it involves the analysis, comparison, classification and systematization of artistic information (Zhang Jie, 2014); are manifested in various types of musical and performing activities and provide artistic knowledge of musical works, the depth of penetration into their emotional and figurative content, determine the performing and analytical potential of a music teacher (Mozgalova, 2011); ensure the success of artistic and pedagogical analysis of musical works, the purpose of which is to reveal the content of a musical work, taking into account age characteristics, musical development and the task of musical education of schoolchildren (Rostovsky, 1997); is an effective means of developing soft skills, as it contributes to the involvement of students in various types of artistic creativity: choreographic, musical, etc. (Mozgalova et al., 2021, p.318); a stylistic approach to the study of music-theoretical disciplines in the process of professional training of future teachers of musical art and choreography (Novosadova et al., 2022).

«People are considered capable of creating new worlds and inspiring reality» (Moskvichova et al., 2019, p.300). According to the concept of Zhang Jie, the structure of skills of artistic and pedagogical analysis includes communicative, cognitive, performing and analytical skills that allow you to operate with basic artistic concepts and distinguish the signs of these concepts, orient yourself in the main historical and theoretical problems, interpret the essence of musical phenomena and scientifically evaluate them (Zhang, 2014).

The concept of artistic-aesthetic training of music teachers by O. Shchokolova reveals the mechanism of artistic-pedagogical analysis of musical works, which obeys general cognitive laws, functions on the basis of the unity of sensory and rational disclosure of reality. The leading idea of the concept is that artistic and pedagogical analysis facilitates the process of learning music by schoolchildren who do not have sufficient musical education, creating a basis for comprehensive musical perception and understanding (Shchokolova, 1996). «In the pedagogical activity of a teacher, artistic communication is considered not only as the main means of artistic teaching, education and development of students, but also as a model that is consciously or unconsciously assimilated, copied and disseminated» (Mozgalova et al., 2022, p.195).

The theories of V. Ostromensky and O. Rostovsky, which emphasize the emotional side of artistic and pedagogical analysis, were fundamental to our research, as this contributes to emotional immersion in a musical piece and the concentration of mental forces on it. These theories substantiate the specifics and features of the artistic and pedagogical analysis of musical works. Thus, the theory of V. Ostromensky defines the peculiarity of artistic and pedagogical analysis in its verbal interpretation, which implies the presence of some subjectivity in revealing the artistic and figurative content of the work (Ostromensky, 1989).

According to the theory of O. Rostovsky, the specificity of artistic and pedagogical analysis is a high level of understanding of music based on the identification of its genre origins, characteristic means of embodiment, history of writing, role and place in modern culture. Widely used in musical and educational practice, such an analysis arouses interest in musical and performing arts, increases the validity of aesthetic judgments, and ensures an active and thoughtful perception of a musical text (Rostovsky, 1997). At the same time, the experience of analyzing one musical work is transferred to other, more complex works. In this way, the systematic and consistent involvement of schoolchildren in music, in understanding its beauty and features is ensured, while maintaining the triad «teacher-music», «student-musical piece"», «teacher-student» (Padalka, 2008).

Therefore, the artistic and pedagogical analysis is an important practice-oriented mechanism for the formation of the personality of the future music teacher. The object of artistic and pedagogical analysis is a musical work, the subject is the teacher and students, the carriers of knowledge are musical texts, reference books, musicological literature, the Internet, computer, technical and other teaching aids play an auxiliary role. The generalization of scientific works made it possible to determine the functions of artistic and pedagogical analysis - informational and cognitive, cultural, mobilizing, developmental, orientational, research, hedonistic.

The success of forming the skills of artistic and pedagogical analysis depends on objective (level of musical culture, quality of musical information, style of pedagogical communication of the teacher, learned repertoire) and subjective

(level of musical and analytical abilities, independence, musical experience) factors. List research on this issue can be significantly expanded, taking into account the analytical work carried out by the authors of the article, but let's take into account the requirements for publications. The analysis of scientific works made it possible to state the importance of further research in this direction.

We focused this study on the formation of the skills of artistic and pedagogical analysis of musical works of future music teachers. This will give them the opportunity in their future professional activities to qualitatively interpret artistic information and, on this basis, to develop students' musical interests, tastes and aesthetic orientations.

### **Methodology**

The methodological basis of the research is: philosophical ideas regarding the essence of musical art as a specific form of consciousness and knowledge of the world, the position of musicology in relation to artistic-analytical activity, concepts and methods of musical education, which are correlated with the tasks of forming the skills of artistic-pedagogical analysis, the theory of personality, according to which the formation of the skills of artistic and pedagogical analysis of musical works directs the artistic and aesthetic perception of the individual, which in the methodological projection of art education is determined by the provisions of cultural, axiological, personality-oriented, systemic, genre-style approaches.

The cultural idea determines the socio-cultural aspects of pedagogical activities, focuses on the systematic and consistent expansion of artistic erudition, acquiring the skills of analysis, comparison and systematization of cultural phenomena etc. In the axiological dimension of the formation of future teachers of musical art, the skill of artistic and pedagogical analysis of musical works must be directed to the creation of a set of value orientations based on the awareness of the valuable content of musical works, their artistic and analytical potential, which motivates their harmonious entry into the professional and socio-cultural environment. In the context of a systemic approach, the formation of the skills of artistic and pedagogical analysis requires the reconstruction of the content of music-theoretical and performance disciplines with the aim of consistent use of artistic and pedagogical analysis, which will allow revealing structural, functional and genetic connections between styles and genres, musical, poetic and artistic works. The genre-style approach allows you to trace the evolution of the development of the musical language, analyze and compare the features of musical works of different genre-style directions with the aim of deeper perception, understanding and performance.

The mentioned approaches in the process of professional training of music teachers direct the scientific and methodical search for the definition and

purposeful application of the artistic and analytical potential of piano music for the formation of the skills of artistic and pedagogical analysis of musical works.

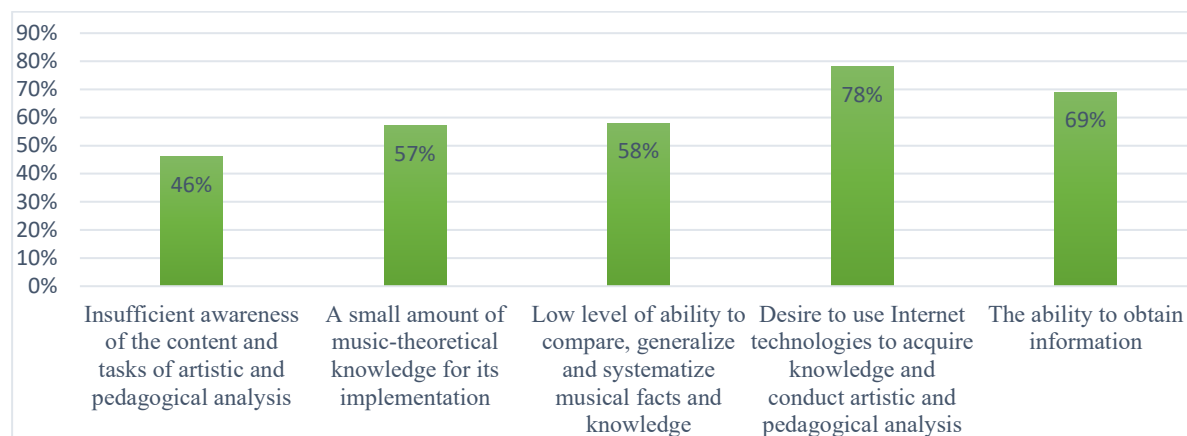
The author's interpretation of this problem is based on the principles, the orientation of which ensures the success of the formation of artistic and pedagogical analysis skills. These are the principles of: integrity (presupposes the consistency of the content of theoretical and performing disciplines, the focus of forms, methods and means of education on the formation of the skills of artistic and pedagogical analysis of musical works), analytical and substantive understanding of musical works (lays the foundation for a balanced, thoughtful attitude of students to musical art), the creative interaction of the teacher and the student (creates the basis for the qualitative implementation of artistic-pedagogical analysis with the aim of developing aesthetic ideals, tastes and preferences), the ratio of rational-logical and emotional in artistic-pedagogical analysis (directs to the activation of intellectual and sensory aspects of cognition, helps to understand artistic and figurative content of the work through logical inferences and emotional experiences), contextuality (requires establishing the semantic unity of the internal content of the music with its external interpretations, the nature of the context depends on the musical text, the figurative vision of the music by the teacher and the general level of development of the students). In the course of the theoretical research, methods of analysis, systematization, and generalization of scientific literature were used to compare and contrast different views on the investigated problem. Methods of concretization, systematization, and scientific abstraction were also used. The considered scientific approaches, principles and methods were taken as a basis for modeling the process of forming the skills of artistic and pedagogical analysis of musical works.

### **Organization of empirical research and its results**

In order to test the model of formation of skills of artistic and pedagogical analysis of musical works of future teachers of musical art, research and experimental work was carried out in three stages - ascertaining, forming and controlling. Teachers and students of Mykhailo Kotsyubynsky State University of Technology and M.P. Ukrainian State University took part in the experiment. Drahomanov, who study under the educational program 025 musical art (48 teachers and 150 students in total). The purpose of the ascertainment stage was to determine the level of formation of students' artistic and pedagogical analysis skills, to study teachers' views on the expediency of using artistic and pedagogical analysis in the practice of training future music teachers, the need to develop and introduce innovative models of artistic and analytical direction into the educational process. The diagnosis was carried out in two directions. The first concerned the survey of teachers, among whom only 45% confirmed the use of artistic and pedagogical analysis of musical works in classes. Others noted that

they use it sporadically, do not attach due importance, focusing on practicing performance skills. 53% of respondents note gaps in the musical theoretical knowledge and analytical skills of students, which affects the quality of artistic analysis of musical works, the ability to determine their essential characteristics, stylistic and genre features. According to teachers, the weak development of analysis skills affects the quality and pace of studying musical works, and their independent processing. Teachers' answers (61%) showed that future teachers' ability to analyze musical works is at a low level; most of them do not understand the essence of the techniques of comparison and generalization, do not know how to use the existing knowledge to analyze musical works, phenomena and events. Therefore, the processing of the results of the teachers' survey made it possible to single out the shortcomings that cause the low level of formation of the skills of artistic and pedagogical analysis: the lesson plan is not rationally drawn up, the low level of musical and theoretical training of students, the lack of individual guidance on the development of their analytical skills. The fact that only 28% of respondents use different types of analysis in classes, which is also a shortcoming of piano training in institutions of higher education, turned out to be negative.

The second direction of diagnosis was aimed at determining the level of development of students' skills in artistic and pedagogical analysis of musical works. For this, the following methods were used: pedagogical observation, survey, questionnaire, testing; a complex of adapted methods: K. Zamfir in A. Rean's modification - to find out the level of internal motivation of students to master the skills of artistic and pedagogical analysis with their further application in professional activity (Zamfir, 2021); M. Rokeach (1988) - to identify the most important values for music teachers of students; I. Yusupova - to determine the level of development of empathic abilities of students, which will allow creating an atmosphere of emotional communication in the process of artistic and pedagogical analysis; V. Sinyavskiy-B. Fedoryshyn (KOS) - to assess the ability to conduct meaningful, dialogic communication using the language of art (Uspenskiy et al., 2003); diagnostic tasks were used to find out the emotional attitude of students to artistic and pedagogical analysis, problem-creative tasks were used to identify the level of artistic knowledge. When discussing the question, the students. The results of diagnosing students using these methods showed their insufficient awareness of the content and tasks of artistic and pedagogical analysis (46%), a small amount of musical and theoretical knowledge for its implementation (57%), a low level of skills to compare, generalize and systematize musical facts and knowledge (58%); the desire to use Internet technologies to acquire knowledge and conduct artistic and pedagogical analysis (78%); the ability to obtain information (69%).



**Figure 1** *The results of diagnosing the formation of artistic and pedagogical analysis skills (made by Authors)*

So, the obtained data showed that while paying considerable attention to the acquisition of psychological and pedagogical knowledge, the development of performance skills and abilities, future teachers do not pay due attention to the ability to analyze and compare musical works, to acquire musical information and to use it appropriately. The author's model of the formation of skills of artistic and pedagogical analysis of musical works is designed to solve the following tasks: increasing the motivation of students for artistic and analytical activities, developing an attitude towards the analysis of musical texts in the process of studying musical works, mastering the mental operations of synthesis, generalization, comparison, systematization; enrichment of artistic and analytical skills by mastering educational and additional literature; stimulating interest in various types of art in order to analyze and understand them; updating the content of piano training of music teachers with new forms and methods of work using information and communication technologies and social networks.

The model was implemented in three stages with the observance of the following pedagogical conditions: the concentration of teachers' attention on the artistic and analytical side of piano classes, the achievement of artistic and creative interaction between the teacher and the student in the process of artistic and analytical activity; relying on the artistic and performance experience of students; development of students' independence in the process of studying and analyzing musical works. The goal of the first (informational and establishing) stage was to interest students in artistic and pedagogical analysis as one of the methods of musical cognition. It used motivational methods (approval, encouragement, persuasion, overestimation, recognition, stimulating evaluation, symbolic reward for actions, situations of mutual help and success) and forms of work (group and individual classes, consultations on the content and stages of artistic and pedagogical analysis). The dominance of the second (analytical and valuable) stage became students' mastery of the algorithm of artistic and



pedagogical analysis with the corresponding enrichment of knowledge and skills. Cognitive methods were relevant: comparison, juxtaposition, artistic analogies, analysis of musical compositions, thematic «chain», study of scientific literature, creation of problem situations, creation of music collections, sketch familiarization with musical works. At this stage, the project «Artistic and Analytical Development of a Teacher» was implemented, in which student scientific circles were involved, scientific and practical seminars were planned (seminar-discussion «Analysis in music», seminar-dialogue «Successful teacher and artistic and pedagogical analysis»), «round tables», «Brain-rings», where problematic situations were created with the aim of activating students' analytical abilities and encouraging independent analytical searches.

The goal of the third (creative and final) stage was for students to acquire artistic and analytical experience, master the methods of independent activity, improve evaluation, communication and performance skills, and direct them to the practical level. In accordance with the goal, motivational, cognitive and interactive methods were used, including discussion, commenting, explanation, analytical observation, verbalization of artistic and figurative content, analytical reading of musical works, logical conjecture, discussion, «round table», analytical commenting on video and audio material, analytical debates, artistic-analytical dialogue.

In the process of implementing the model, multimedia platforms (Zoom, Moodle, Uber Conference Google Meet) and programs (Viber, Skype, Microsoft Word, Sony Vegas Pro, Power Point, Prezi, Corel Draw, Adode Photoshop) were used. Comparison of the results obtained after each stage showed positive changes (increase of high level from 17.3% to 51.1%, medium - from 31.1% to 42.6%, reduction of low level from 51.6% to 6.3%) from the implementation of the model of formation of artistic and pedagogical analysis skills. This was reflected in the activation of students' analytical-cognitive and performance-creative activities, in their emotional attitude to the artistic-pedagogical analysis of musical works.

## **Conclusions**

Experimental verification of the effectiveness of the model of formation of skills of artistic and pedagogical analysis of musical works proved its innovativeness, effectiveness and efficiency in the university practice of piano training of future music teachers. The implementation of the model opens up wide opportunities for identifying the analytical and artistic abilities of students, provides constant filling of the artistic thesaurus, expansion and enrichment of their cognitive and emotional experience. The model provides wide opportunities for the realization of the artistic and analytical potential of piano music in the professional training of music teachers, promotes the activation of educational and performing activities based on the proposed principles, pedagogical

conditions, forms and methods of teaching, provides for the acquisition of artistic and analytical experience as the basis of successful professional activity.

This problem requires further study in the direction of ensuring continuity in the formation of the skills of artistic and pedagogical analysis of musical works, updating the content of musical and theoretical ones, improving the methodology of piano teaching based on an artistic and analytical approach, comparing the experience of forming the skills of artistic and pedagogical analysis of musical works in different countries.

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# INCREASING FUTURE ENGINEERS' MOTIVATION FOR ACQUIRING ENGLISH LANGUAGE PROFESSIONAL COMMUNICATIVE COMPETENCE

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**Abstract.** *Modern engineers have to constantly upgrade their knowledge and skills to stay relevant in today's rapidly developing world and to establish professional ties with counterparts from other countries. It can hardly be done without knowledge of English as a dominant language of science and technology. Foreign language teachers in Ukraine and many other countries face the problem of improving technical students' communicative competence to such a level that they could become full-fledged participants in intercultural professional communication. The problem can be solved provided that students have strong positive motivation for learning a foreign language.*

*The aim of the study was to select and test a complex of methods to increase future engineers' motivation for acquiring foreign language communicative competence. These methods included problem-solving, case study, web-quest, dilemma, round table, essay, audiovisual translation, etc. The effects of the tried-and-tested methods were compared to the results of a traditional teaching.*

*The research was carried out at Kharkiv National Automobile and Highway University in 2021-2023 and aimed to compare 1) stability of students' cognitive interest; 2) disclosure of creative potential; 3) development of language skills of two groups of learners: the experimental group and the control group.*

*The results of the study indicate that the use of special methods to motivate students for language learning had a significant positive impact on future engineers' communicative competence.*

**Keywords:** *learning English, motivation, pedagogical experiment, technical students.*

## **Introduction**

The success of cross-cultural cooperation is largely determined by cultural adaptability of its participants: their tolerance, flexibility, ability to value the beliefs of others, and, of course, mastery of foreign languages, primarily languages of intercultural communication. The establishment and development of globalization ties are helped substantially by the wide use of the English language, which has a significant impact on both, the world community in general, and on the advances in science and technology, in particular.

Future engineers must be prepared to keep up with the development of technology, so they need not only fundamental knowledge and skills in the field of their specialty, but also information about the latest gains in this field, because, as research shows, now the obsolescence of scientific and technical knowledge makes up 20–30% per year. In 1982, Buckminster Fuller introduced his “knowledge-doubling curve.” He found out that until 1900 human knowledge doubled approximately every century. By the end of World War II knowledge was doubling every 25 years. To this, IBM added its post-1982 predictions, according to which, the development of information technologies will lead to the doubling of knowledge every 12 hours (Hassan, 2020).

That means that engineers have to constantly adapt and upgrade their knowledge and skills to stay relevant in today’s rapidly evolving world. It can hardly be done without knowledge of English, as within the last few decades, English has become the dominant language of science, with more than 90 % of the indexed scientific articles in the natural sciences published in this language (Ammon, 2012). English is of immense importance for engineers in publishing the findings of their research, and also for furthering their academic career, thus, it is indispensable for the people who have adopted engineering as their career (Shrestha, Pahari, & Awasthi, 2016).

Despite the evident importance of English, in reality language acquisition encounter some problems at Ukrainian technical universities, the main of which is students’ low motivation for language learning, that has always been a challenge for teachers and researchers.

The aim of the study was to identify means and tools to increase future engineers’ motivation for acquiring foreign language (FL) professional communicative competence. The narrower tasks of the study were: (a) to outline the demands for future engineers’ FL communicative competence; (b) to try and test experimentally methods for enhancing learners’ motivation; (c) to assess changes in indicators of motivation due to the use of these methods.

## **Literature Review**

Observations reveal that, although applicants enter a university with approximately the same level of knowledge, later they are divided into "strong" and "weak" students mainly due to the quality and type of motivation. This allows to assert that a high level of positive motivation for learning can compensate for the lack of abilities or knowledge and will become a kind of a compensatory factor if learning motivation is sufficiently developed.

Motivation has always been discussed as an important problem in the foreign language learning and teaching. Researchers believe that it “functions as an ongoing driving force that helps to sustain the long and usually laborious journey of acquiring a foreign language” (Cheng, & Dörnyei, 2007, p. 15); it can be defined as a motor because it etymologically “moves” us toward a goal, while also determining the intensity and duration of the movement (Caon, 2020).

The researchers consider various aspects of motivation and the ways of its development: effective motivational pathways in language learning environments (Muir, & Dörnyei, 2013); a multifaceted approach to language learning motivation through combination of complexity, humanistic, and critical perspectives (Pigott, 2012), self-motivation (Kimura, 2014); the role of self-theories in motivation, personality, and development (Dweck, 2000); the relationship between second language self-guides, language learning motivation and achievement (Demir-Ayaz, 2016), development of willingness to communicate in a second language (Yashima, Zenuk-Nishide, & Shimuzi, 2004), etc.

In general, scientists identify two main groups of motives that students are guided by during their studies – social (extrinsic) and cognitive (intrinsic) (Morris, Grehl, Rutter, Mehta, & Westwater, 2022; Marszalek, Balagna, Kim, & Patel, 2022).

The hierarchy of motives is based on internal motives, others perform an additional function of stimulating to actions. Intrinsic motivation is aimed at achieving inherent satisfaction from one's activities, for example, a sense of competence and self-determination. Extrinsically motivated activities are aimed at receiving external rewards or avoiding punishment (Morris et al., 2022), although it should also be taken into account, since there are many ambitious young people among students who pay considerable attention to such status markers as awards, diplomas, winning at competitions, receiving high grades for exams, etc. In addition, many students are interested in external rewards because information of them can be included in a graduate's CV, which is often seen by modern employers as an indicator of not only a student's abilities, but also of their potential.

Therefore, the teacher has to face the task of both the formation of intrinsic motives, and the skilful use of stimuli (extrinsic motives) in learning and extracurricular activities.

One of the main intrinsic motives is cognitive interest (Renninger, & Riley, 2013), which determines the quality of training. In order to satisfy learners' cognitive needs, those methods should be used that stimulate cognitive activity, arouse interest, help to establish an atmosphere of collective search, constructive tension, positive emotions, and creativity.

## **Methodology**

Educational programmes in language learning (LL) at a technical university consider as the desired result the formation of graduates' communicative competence, which will ensure their effective functioning in the cultural diversity of professional environments (<https://www.khadi.kharkov.ua/education/katalog-osvitnikh-program/>). Such LL is based on the main provisions of the Common European Framework of Reference for Languages: Learning, Teaching, Assessment (Council of Europe, 2001), which provide a standardized foundation for the development of university courses according to the professional needs of students and societal expectations.

In compliance with the Framework of Reference, the language learner is supposed to acquire linguistic, pragmatic and sociocultural competences, which are necessary for the performance of tasks related to study and work.

As for linguistic competence, which consists of lexical, grammatical, semantic, phonological, orthographic competences, teachers can hardly have any difficulties in designing courses, since there is a great number of excellent textbooks in this field. Pragmatic or professional communicative competence is formed in students of various specialties for narrow professional needs, and it is hardly possible to give common recommendations for training lawyers, economists, engineers or doctors. Therefore, it is quite natural that each department of foreign languages design their own courses of English for Specific Purpose to meet the needs of their students.

As for socio-cultural competence, it means the ability of understanding and interpretation of various aspects of culture, and presupposes the availability of skills to act appropriately in a cross-cultural situation. Since culture is a very broad concept that covers almost all spheres of life and cannot be fully learnt at an educational institution, language teachers are expected to develop their own resources by selecting and adapting materials from existing textbooks; using audio and video podcasts, mass media publications, Internet resources etc., to meet the needs of their students.

So, the tasks are multiple and challenging while the number of hours for LL at a technical university is limited, hence, this is motivation that can play a

crucial role in a successful language acquisition, therefore methods of motivating students to LL are in the process of constant improvement and enrichment.

In order to select and test the most effective methods of motivating students to acquire communicative competence, in 2021-2023 a pedagogical experiment was conducted at Kharkiv National Automobile and Highway University. An experimental group (EG) of students of various specialties (103 persons) was created, who were involved in classroom and extracurricular activities using modern innovative teaching methods, and a control group (CG) consisting of 100 persons, in which students were taught in a more traditional format. The students had one 90-minute lesson per week during three semesters.

To evaluate changes in the dynamics of motivation, the following criteria and indicators were chosen: 1) stability of cognitive interests (high, average and low levels); 2) disclosure of creative potential (full, partial, lack of disclosure); 3) development of communication skills (high, average and low levels).

The following indicators are characteristic of a *high level* of a cognitive interest development: the student works actively during the class, shows initiative and creativity, consciously strives for self-learning. An *average level* is characterized by situational interest depending on the degree of engagement with the material, by periodic prompts from the teacher, insufficient persistence in solving problematic tasks. A *low level* is characterized by the student's unwillingness to LL, attempts to avoid work. To test interest in learning English we conducted a survey using the Foreign Language Learning Motivation Questionnaire (Gonzales, & Lopez, 2016) adapted to our purposes.

The main indicators of a *full disclosure of creative potential* are a significant number of ideas that arise per unit of time; flexibility of thinking as the ability to quickly switch from one idea to another; unexpected decisions. A *partial disclosure* is a limited number of new ideas, a traditional approach to decision-making, unwillingness to take risks, caution in decision-making in a situation of uncertainty. A *lack of disclosure* of creative potential is revealed in the inability to generate original ideas, slowness of thinking, reluctance to participate in collective problem solving. In order to obtain data on the dynamics of unlocking creative potential we conducted a survey *the Creativity Styles Questionnaire* (Kumar, Riley Holman, & Kemmler, 1997).

We checked the development of language skills (speaking, reading, listening, and writing), which mainly indicated the level of *communicative competence*, with the use of IELTS Practice Tests (diagnostic and final). The levels of communicative competence were assessed by a 100-point scale: 90–100 points – a high level, 75–89 – an average level, 74 and below – a low level.

A *high level* of communicative skills means the ability to consistently develop oral and written expression with a sufficient degree of completeness and correctness; the ability to express an evaluative attitude to the subject of



communication. Students with an *average level* mostly act according to an analogy, a template, feel indecisiveness when establishing contacts. A *low level* of communication skills is typical for students who show an indifferent attitude to establishing contacts, show insufficient mastery of verbal and non-verbal means of communication.

At the ascertainment stage of the experiment, the initial level of motivation of students for acquiring communicative competence was diagnosed according to the predefined criteria. At the formative stage, various methods of increasing the stability of cognitive interests, unlocking creative potential and developing communication skills were tested; at the control stage, the results of the experimental work were summed up.

Among the methods, due to which cognitive interest went from a state of situational interest to the desire to self-directed studies, interactive technologies (Pometun, & Pirozhenko, 2004) proved their effectiveness in the classroom work and extracurricular activities, e.g., methods of cooperative learning: work in pairs, rotating (changeable) threes, “carousel” (inclusion of all participants in active work with different communication partners to discuss problematic issues), work in small groups, “aquarium” (a group of 4-6 students is separated from the rest of the group and discusses a debatable situation); interactive technologies of group learning: discussion of the problem in a general circle, “microphone” (everyone is given the opportunity to say something quickly, in turn, answering questions or expressing their opinion or position), “brainstorming”; simulations, role-playing the situation (acting out a scene, dramatization); a TV talk show style discussion, round table discussion, etc. For example, during the round table discussion on the topic “People who changed the world” the participants of the event discussed the following problems: Who makes history – individuals or nations? What do antiheroes teach us? Happiness in personal life and a great mission. Is this possible? A person becomes great if/when... Which of the famous people can be called a hero of our time? Explain why. Can a hero become an antihero and vice versa? Give examples. What distinguishes the heroes of today from those who lived 200 years ago? Are the categories of “hero” and “anti-hero” absolute? Who (or what) raises the hero? And so on.

During the training in intercultural communication, the following problems could be discussed: In your opinion, what personal qualities should a person who is going to rest in an international student camp have? How would you build a relationship of trust between you and your partners – representatives of other nationalities? Give examples of how personal relationships can help destroy stereotypes and improve mutual understanding between partners; What do you think are the stereotypes about your culture formed by representatives of other cultures? Give arguments “for” and “against” the adoption of bilingualism in your country.

A variety of problem-solving methods is the case study (an analysis of certain economic, legal, historical situations in which people's interests, life views, positions clash), for example: Company X. is a national leader in hybrid cloud computing with offices throughout the country and links abroad. The challenge is to enhance collaborating across offices as a quality work suffers from poor communication. The task was to develop a video solution to build stronger relationships across national and international offices.

As a means of activating the students' creative potential, we organized essay contests on various social and humanitarian topics (e.g. "Education today: the biggest threats and challenges") and contests for famous poetry pieces translations that aroused interest and enthusiasm among students.

Moral dilemmas that involved the students in solving complex life problems also sparked intense interest, for example: You plan to sell your old car to buy a newer model. The car is in a more or less decent condition, so you don't want to reveal the fact to a potential buyer that the car doesn't start well from time to time, and it has had an accident. Should you inform buyers that there may be problems with the car, or do you think that buying a used car is a matter of prudence and responsibility only of the buyer?

It is impossible to imagine the modern educational environment without digital technology that is becoming more and more sophisticated, its tools and applications can be used in and outside the classroom, in both formal and informal settings, in order to increase students' motivation (Panagiotidis, Krystalli, & Arvanitis, 2023). Information and communication technologies such as computer programs, virtual dictionaries, interactive maps, mobile applications and other resources made a significant contribution to increasing cognitive interests and unlocking the creative potential of the EG students, the most popular among were Quizlet (helps master English vocabulary with the use of flashcards and practice tests); Online Test Pad (tests both grammatical and analytical knowledge of English in a test form); MyEnglishLab (is a real hub of educational materials: exercises, audio, videos and tests); Kahoot and Wordwall (help create interactive educational games: quizzes, discussions, polls); the Internet site <http://www.bbc.co.uk/learningenglish>, etc. In addition, the British Council|LearnEnglish site, which offers plenty of useful materials for online learning was of great benefit.

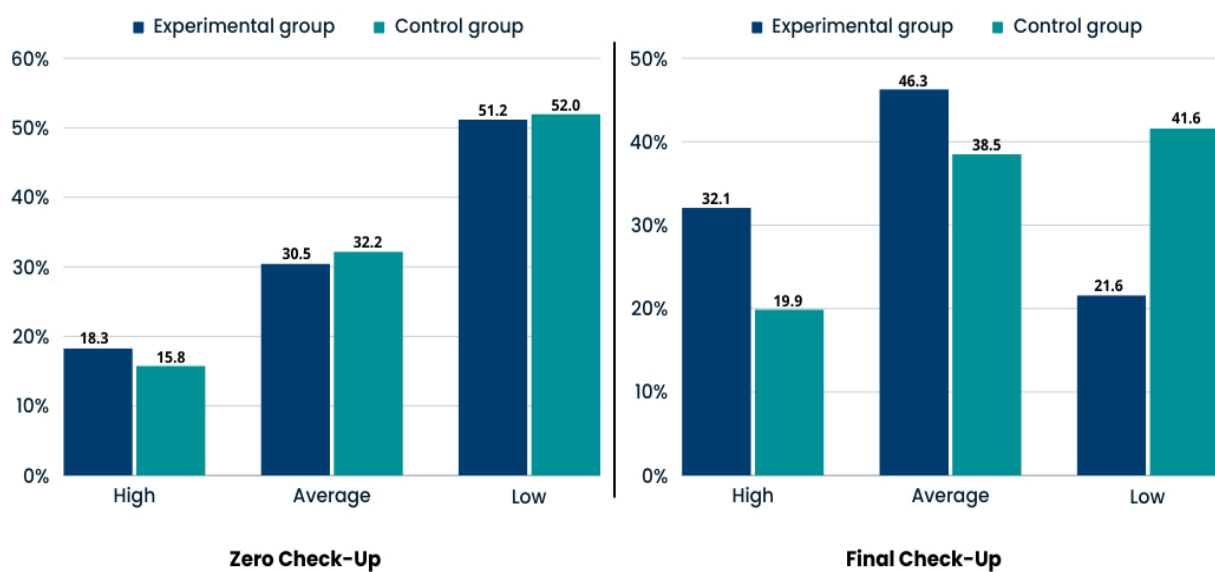
Also, as a part of extracurricular activity the students took part in web-quests (ideas were available on <http://www.tripadvisor.com>) that simulated real communication situations, taught the students to make decisions in conditions of everyday and professional life.

## Research Results

At the control stage of the experiment, the results of the experimental work were analyzed and summed up.

The obtained data suggest that a more significant positive dynamics was observed in the EG compared to the CG by all chosen criteria of the development of motivation for acquiring FL communicative professional competence.

Fig. 1 shows the dynamics of the changes in the character of students' cognitive interest.



*Figure 1 Trends in the development of cognitive interest (made by authors)*

A more expressed positive dynamics in the experimental group testifies that using various forms and methods of arousing cognitive interest: interactive methods, discussions, debates, role-playing, online technologies, virtual excursions, quests, etc. contributed largely to the development of positive motivation for acquiring FL communication competence.

The degree of the disclosure of creative potential was also more pronounced in the experimental group compared to the control group (Table 1).

The development of a person's creativity often depends on the environment in which it is formed, so the organization of the creative environment in our approach due to numerous problem-solving situations, case studies, writing essays, translating poetry, brainstorming, modelling of professional situations, creating videos, taking part in discussions contributed to unlocking students' creative potential, while the teacher performed the function of an adviser, a facilitator who creates an atmosphere of tolerance and mutual respect.

*Table 1 Trends in disclosure of creative potential (%) (made by authors)*

Group Degree of disclosure	E (103 pers)		C (100 pers)	
	Before experiment	After experiment	Ascertaining data	Control data
Complete	13.2%	32.1%	13.3%	20.1%
Partial	34.5%	47.8%	35.7%	49.2%
Lack of disclosure	52.3%	20.1%	51.0%	30.7%

To obtain data on the dynamics of the English language communicative skills, the points for the IELTS diagnostic and final tests were compared and analysed.

When determining the level of development of communicative skills, we used a coefficient of assimilation of educational material, based on the methodology of Elnikova (1996), modified for our purposes. The results are presented in Table 2.

*Table 2 Dynamics of the levels of communicative skills development (%) (made by authors)*

Group Level	E (103 pers.)		C (100)	
	Before experiment	After experiment	Ascertaining data	Control data
High	14.2%	31.0%	15,1%	26.3%
Average	34.6%	44.9%	36,2%	41.7%
Low	51.2%	24.1%	48,7%	32.0%

Due to the involvement of students in active creative and collaborative activities, the number of students with the high level of the development of communication skills, who regard communication as the basis of interaction, mutual understanding, exchange of information, and are willing to acquire communication competence increased significantly.

### Conclusion and discussion

Today, the professional activity of a technical university graduate is directly related to globalization processes and requires knowledge of the English language to be aware of the trends in the field of their specialization and to establish mutually beneficial relationships with counterparts from other countries. To make these relations deep, versatile and fruitful the specialist should be able to communicate in every-day situations to maintain personal

contacts, to discuss professional issues, to have a broad outlook and to express their opinion on various aspects of socio-cultural life.

Foreign language teachers face the problem of developing students' communicative competence (within a very limited period of time) to such a level that they could subsequently become full-fledged participants in the scientific collaboration and intercultural communication.

That means the necessity of students' strong positive motivation for LL, which, as shown by the results of this study, can be successfully developed due to the use of various methods that stimulate cognitive interest and creative activity of students, in such a way contributing to more effective acquisition of communication skills.

An important task of foreign language teachers is the development of educational programs that not only prepare for a career in a specific field, but also provide a basis for continuous learning throughout life, since a foreign LL is an area that requires constant and patient work in order to preserve and expand the knowledge and skills acquired in an educational institution. This aspect of technical students' training requires additional research, since a university graduate should have easy-to-reach and understandable resources to continue FL self-study.

Thus, the emphasis in education should be shifted from the mastery of knowledge to the mastery of the learning process itself to make students purposeful, proactive learners, who are ready to take responsibility for their self-development and professional self-actualization.

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# CHALLENGES OF DIGITAL EDUCATION DEVELOPMENT AT LAW ENFORCEMENT TRAINING INSTITUTIONS

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**Abstract.** *With the ongoing progress of digital education opportunities, recently the buzz of artificial intelligence law enforcement education processes also requires identification and analysis of evolving phenomena. In order to ensure a safe up-to-date, highly efficient training process law enforcement officials involved in education process need to be competent with current education trends as well as be able to establish future visionary self-developments, be able for timely adaptation and constant exchange of best practices. The main goal of the article is to identify, analyse and summarizes latest EU scale digital education development visions and research results in context of digital learning, artificial intelligence, possible problems, risks and concerns regarding further digital education integration within specific law enforcement education environment. The article includes the identification of problematic areas by using historic research method, particularly from digital education integration learning experiences. At the conclusion of this research future outlooks in harnessing the potential of digital education within law enforcement have been proposed based on analysis of scientific literature, legal documents as well as empirical insights derived from hands-on experience in teaching within law enforcement environment.*

**Keywords:** *artificial intelligence, digital competence, digital education, law enforcement.*

## Introduction

Post Covid-19 e-learning hyperinflation – peak, reforms, transformations conclusions and suggestions retain and ongoing need to research and further strengthen digital education perspectives at all levels. Future digital education perspectives have been defined on April 18, 2023 via The European Commission has approved initiatives aimed at enhancing digital education and training throughout the European Union with the goal of facilitating top-notch, inclusive, and easily accessible digital education and training to cultivate the digital expertise of European citizens (European Commission, 2023). The EU, within the Digital action plan for 2021-2027 is planning to facilitate excellence in advanced and specialized digital skills courses both in higher and vocational and training (European Commission, 2023) Just like in all spheres and contexts of education also in law enforcement it is essential not only to provide high quality, efficient and up-to-date education process, simultaneously, taking into consideration specific environment of law enforcement training as restricted or limited access

information, it is important to analyse carefully all aspects, risks and challenges when implementing rapid training transformation. According to the Council of Higher Education in Latvia when universities and colleges incorporate AI tools into their academic work, including adapting and changing their learning, teaching and assessment approaches and research methods, they should also be aware of the academic integrity risks posed by AI tools (Jurista vārds, 2023).

Furthermore, it is essential to identify the key areas law enforcement institutions need to invest in – both from the perspectives of infrastructure and, from perspectives of personnel's' digital competence. Research findings suggest that teachers having better ICT infrastructure at their workplace are more inclined to adopt digital technologies to and integrate various dimensions of their instructional practices (Soomro et al., 2020).

The objective of this study is to identify the main trends in AI integration for educational purposes define the main areas which will facilitate or decrease the development of digital education as well as provide suggestions on what practical steps need to be taken to use the potential of digital education at its most in specific law enforcement environment. To achieve the research objective, the author examines scholarly literature on education and technologies, outlining both the advantages and disadvantages regarding the potential of digital education within law enforcement education systems. The research includes analysis of scientific literature to identify main tendencies of digital education as well as to develop proposals to enhance the efficiency of digital education capacity in law enforcement training.

### **Topicality of digital education and AI development within the law enforcement**

Over the last decade researchers were analysing contexts of digital education and artificial intelligence. Researchers indicate that artificial intelligence has gained significant attention in various domains of governance, spanning discussions about the evolution of employment, public management, security, and even response strategies for crises such as the COVID-19 pandemic. (Nalbandian, 2022).

There has been especial intensification of research across the EU recently concerning the development of AI, particularly with the launch of Chat GPT at the end of 2022. According to developed ChatGPT is intended as AI chatbot auto-generative system created by for online customer care. It operates as a pre-trained generative chat using (NLP) Natural Language Processing. The source of ChatGPT is data from various sources - textbooks, websites, articles, which computer uses to model and form its own language for response to human interaction (Pocock, 2023).



Researchers define AI “as the process of using computers and machines to mimic human perception, decision-making, and other processes to complete a task”, when machines engage in high-level pattern-matching and learning in the process (Jimenez & Boser, 2021).

The developers of AI believe that their research will eventually lead to artificial general intelligence, a system that can solve human-level problems, they build “generative models using a technology called deep learning, which leverages large amounts of data to train an AI system to perform a task” (Achiam, 2023).

According to research findings (Božič & Poola, 2023) the integration of technology in education holds promise for transforming the learning process, facilitating individualized and engaging educational experiences, and granting students access to extensive resources and information. Nonetheless, the adoption of ChatGPT technology presents obstacles and constraints, such as worries regarding academic dishonesty, safeguarding data privacy, and mitigating bias. It is imperative for educators and policymakers to acknowledge these hurdles and implement suitable strategies to tackle them effectively.

The Digital Education Action Plan emphasizes the necessity of modernizing every education system, stressing the significance of all educational levels and sectors in addressing gaps in digital skills. It underscores the importance of enhancing educators' digital competencies and acknowledging the imperative to cultivate digital skills for societal participation within the framework of European innovation and competitiveness. (European Commission, 2020).

“The European Commission has updated the Digital Competence Framework (DigComp 2.2) to include skills, knowledge and attitudes related to AI and the use of data. The Commission plans to support the development of AI learning resources both for education and training” (European Commission, 2020). The goal of this plan is to empower all citizens and eventually becoming confident, critical and responsible end-users of digital technologies driven AI systems and autonomous decision-making, and aiming to enhance comprehension of AI, including its capabilities and constraints. Also, UNESCO is advising us to stay informed about emerging trends concerning AI's capacity to bolster learning and assessment methods, and reassess and adapt educational frameworks to foster deep incorporation of AI and reshape learning approaches. Contemplate utilizing existing AI tools or creating novel AI solutions in situations where the advantages of AI application significantly outweigh the associated risks. These efforts can aid in facilitating specific learning activities across diverse subjects and promoting the advancement of AI tools for interdisciplinary skills and competencies (UNESCO, 2019).

Researchers note that implementing or introducing digital learning entails more than just transitioning to online formats; it necessitates strategic planning

and effective leadership focused on integrating technology-driven learning and digitally transforming higher education (Redden et al., 2018).

### **Obstacles and possibilities of digital education integration and further development**

Researchers indicate the aspect of implementing digital learning involves more than merely shifting to online formats; it requires deliberate planning and strong leadership dedicated to integrating technology-driven learning and digitally revolutionizing higher education. Researchers (Laufer et al., 2021) urge to promote policies and initiatives concerning digital learning and cooperation at institutional, national, and international levels. Additionally, advocate for a scholarly and practical emphasis on digital education leadership or e-leadership, where higher education leaders share resources with other entities, prioritize collaboration over personal advancement, and raise awareness of hidden inequalities addressable through digital technologies, both internally and externally. Furthermore, researchers suggest expanding existing university networks and forming new alliances, underscoring that the future may bring fresh global challenges necessitating international collaboration within the global knowledge community. Also, the Council of Higher Education in Latvia believes that in this process of change, Latvian higher education must assume a leadership role. Latvian universities and colleges must take the initiative and integrate AI tools in higher education and research (Jurista vārds, 2023). Undoubtedly not only strategies and policies with regard to AI should be developed but also teachers have to be prepared for upcoming changes. Preparation of teachers for AI integration has been outlined in UNESCO Beijing consensus (2019), where “governments and other stakeholders in UNESCO’s Member States, in accordance with their legislation, public policies and practices are encouraged to consider several actions in response to the education-related opportunities and challenges presented by AI” (UNESCO, 2019), including recognizing that although AI offers prospects to assist teachers in their educational and pedagogical roles, it's crucial to prioritize human interaction and collaboration between teachers and learners as the foundation of education. The Beijing consensus cautions us to acknowledge that machines cannot replace teachers and to safeguard their rights and working conditions. Member states are encouraged to continuously reassess and delineate the roles and necessary skills of teachers within the framework of teacher policies, enhance teacher training institutions, and create suitable capacity-building initiatives to equip teachers for proficient work in educational environments abundant with AI. (UNESCO, 2019). The results of Montenegro-Rueda et al. (2023) twelve studies “show that the implementation of ChatGPT in the educational environment has a positive impact on the teaching–learning process, however, the results also highlight the

importance of teachers being trained to use the tool properly". As AI technologies become more prevalent in law enforcement, it is essential for all parties involved, including community representatives and other criminal justice entities, to engage in ongoing discussions regarding the balance between personal privacy and public safety. These conversations become increasingly pertinent as AI applications advance, offering enhanced surveillance and investigative capabilities.

Researchers conclude that thoughtfully crafted formative AI assessments leveraging cutting-edge technological advancements can accelerate and enhance student learning. These mechanisms are integral components of the teaching and learning journey. Whether through intelligent tutoring, stealth assessments, gamification, or virtual reality, AI-generated mini-tests offer diverse avenues for creating engaging educational tools. However, achieving this goal necessitates increased investments in research and development of novel testing technologies within the education system, empowering teachers and students with essential resources (Jimenez & Boser, 2021).

### **Conclusions of literature review and proposals**

After research of scientific literature undeniably we can conclude that we are facing even more rapid development of AI which will bring even more learning possibilities and even more following risks. Particularly law enforcement institutions have to consider AI integration risks carefully since education process is related to restricted access information and rather limited sources of information. Law enforcement education institutions have to collaborate both at strategic level to develop joint policies strategies for AI effective and safe use, should develop long-term plans (including financial investments) to support teacher competence development, particularly digital competence and research interest. In order to cascade AI integration best practices regional digital education research and competence building excellence centres or alliances should be established among law enforcement education institutions, for example within law enforcement education establishments in Baltic states. Such excellence centres should collaborate with analogue establishments across the EU, could have strategic collaboration activities with leading and respectable law coordination, training and development support organisations as Frontex, Cepol, NATO, George Marshall Centre etc. Furthermore, establishment of such excellence centres could be initiated on the basis of EU funding programs programmes. Among AI research and development activities these centres would take part in in strategic policy developments, interactive AI training content development and teacher training activities to share and disseminate best practices of AI usage and mitigation of potential risks as cyberattacks, etc.

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# THE IMPORTANCE OF MARKETING ACTIVITIES FOR THE FUNCTIONING OF THE UNIVERSITY

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**Abstract.** *At a time when the number of universities is growing, taking care of the image of a university is increasingly important. Traditional methods of promotion are no longer sufficient, because nowadays the choice of a university starts not with a visit to the university, but with checking its educational offerings on the Internet. This is why, in the digital age, universities need to adapt their marketing strategy to the new realities in order to reach prospective students and stand out from the competition. Many universities are actively taking advantage of the opportunities offered by the development of information technology, appreciating the importance of branding and adapting their course. This paper attempts to identify which 'communication pathway' is most frequently used by prospective university/faculty students. The aim of the study is to determine the effectiveness of promotional activities that influence prospective students' choice of university/department. The issues raised seem to be important due to the fact that radical changes in the education market have been taking place for several years now. On the one hand, there is a large supply of higher education institutions, both domestic and foreign, and on the other hand, there is a progressive demographic decline.*

**Keywords:** *customer preferences, marketing in education, university management.*

## Introduction

The condition for the effective implementation of marketing in universities is to create a coherent composition of marketing activities that support and complement each other. The integration of marketing activities should take place not only in terms of their internal coordination, but also at the structural level related to the location of the marketing function in the structure of a given university. Many universities actively use the opportunities offered by the development of information technologies, appreciate the importance of the brand, adapt their curricula to the needs of employers, thus ensuring an advantage in the increasingly demanding higher education market. In the article, the authors

attempted to identify which "communication path" is most often used by potential students of the university/faculty.

The aim of the study is to determine the effectiveness of promotional activities that influence the choice of university/field of study by future students. The issues discussed seem to be important due to the fact that the radical changes in the educational market have been going on for several years. On the one hand, we are dealing with a large supply of universities, both domestic and foreign, and on the other hand, there is a continuing demographic decline. This situation forced branches to take intensified marketing activities aimed at establishing and maintaining permanent relationships with customers. The research covered the first years of students from the fields of Agricultural and Forestry Technology, Renewable Energy Sources and Management and Production Engineering at the Agricultural University. Hugo Kołłątaj in Kraków at the Faculty of Production and Energy Engineering. The research was conducted in three consecutive years: 2019, 2020 and 2021. The authors presented proposals for innovative solutions that can be implemented at the university for even better activities that will result in a larger number of students at the university in the future.

### **Literature review**

Education is a very important element of functioning in the modern world. It is a pillar of development. Tertiary education has become a global service provided by quasi-companies in an increasingly complex and competitive knowledge market (Pucciarellia, Kaplan 2016) A knowledge-based society shows a constant need to improve its competences, to participate in courses as well as in all kinds of training. A unique opportunity in this respect is provided by universities, which offer the possibility of acquiring education in a chosen field. In addition, the better the reputation of a given university, the more positively the academic staff and the quality of education are assessed, the more popular it is and, consequently, the more students want to study there. (Kijanka, 2012). As noted by B. Nguyen, T.C. Melewar and J. Hemsley-Brown, in the contemporary environment "the branding of universities has increased significantly due to demands on universities to recruit more students, rising tuition fees, multiplication of courses, increasing 'internationalisation' of universities, financial pressures" (Nguyen, Melewar, Hemsley-Brown 2019)

The need to undertake university promotional activities can be spoken of as an evolving process. Consumers, including educational services, are more sensitive to the influence of external factors and trends related to the socio-economic situation, the market, technologies, geopolitics and the environment (Zhang, Watson 2020). Changing circumstances in the higher education market, have imposed the need to inform the public about the educational offerings and the successes achieved therein. While the competitiveness of HEIs is built

primarily through internal aspects such as the level of corporate culture and the effectiveness of marketing strategies, the reputation of HEIs is one of the priority factors influencing applicants' choice to study at a particular HEI (Sarkane, Sloka 2015). The pressure of high competition has forced HEIs to expensive promotional activities, the same as those used by companies seeking to attract customers for their services. As Penc (1995) states, 'the success of any business today is inextricably linked to the marketing concept of the business, i.e. the interests or benefits it seeks to realise by turning unmet market needs into profitable market opportunities. Marketing is a certain business concept that identifies market needs and, on this basis, designs and produces products and services that are in demand (Zurawik, Zurawik, 1996).

Thus, there was a need to identify the target group to which all marketing activities will be directed. Hence Domanski (2011) identifies four target groups:

- Target groups locally - where all measures taken will be aimed at residents of the city and region. In addition to secondary school students, there may also be older people wishing to broaden or supplement their knowledge through, for example, postgraduate studies or other forms of further training. This trend seems to be becoming more and more apparent as a result of the prevailing demographic decline, which is increasingly being felt. Higher education institutions are faced with the need to prepare specialised educational offers designed for a specific audience.
- Target groups in regional terms - which are the inhabitants of a city neighbouring the city in which the selected university is located. Professional preparation of the promotional and informational message allows the creation of an image of the place that gives character to the development of the city where it is located. The benefits of this spread to other towns and cities around it. A broader approach makes it possible to enlarge the group of potential audiences, which enables a fuller exploitation of the potential that a given educational institution has at its disposal.
- Target groups nationally - attracting people from outside a particular city and region to study in another is a kind of confidence they have in their chosen destination. A longer journey involves more money to be spent. The main factor that is taken into account when deciding where to study is not only the university, but also the city in which it is located. This indicates attractiveness in the eyes of the prospective student. Universities should monitor which provinces students come from most often, and city authorities should monitor whether it is advantageous for them to settle in their territory and take up employment after finishing their education.

- International target groups -Domanski (2011) distinguishes between two strategies. The first assumes long-term and consistent work on image formation, but only cities and regions with an established international presence can afford this type of campaign. Above all, those counties with a long university tradition. The second strategy is based on modernity and consists of a dynamic presentation of the educational establishment, the city and the region, innovation and great development opportunities in the district. Universities make it a point to move to the locality in which the institution is located for those not directly born there, but who wish to start their education there. Factors conducive to staying include the possibility of gaining employment after graduation, good infrastructural facilities or better development prospects.

The above-mentioned reasons not only confirm the indispensability of undertaking promotional activities, but at the same time prove that marketing should be one of the key formulation activities of a given enterprise. Furthermore, a prerequisite for the effective implementation of such activities in higher education institutions is the creation of a coherent composition of marketing activities that support and complement each other. In today's market reality, the success of such establishments is also determined by the ability to be flexible, i.e. to constantly adapt to changing trends and environmental conditions.

## **Methodology**

The aim of the study was to determine the effectiveness of promotional activities which have the most effective impact on the choice of a university/degree programme by prospective students. For the purposes of this study, the authors assumed that marketing activities are effective when a given activity influenced the decision of the respondents on the choice of a university (e.g. information on the website). The subject matter seems to be important due to the fact that radical changes on the education market have been taking place for several years. On the one hand, there is a large supply of universities, both domestic and foreign, and on the other hand, a persistent demographic decline. This situation has forced institutions to intensify their marketing activities in order to establish and maintain lasting relationships with their audiences.

The study covered the first years of students of Agricultural and Forestry Technology, Renewable Energy Sources and Management and Production Engineering at the Hugo Kołłątaj Agricultural University in Kraków, Faculty of Production Engineering and Energy. The study was conducted in three consecutive years using a questionnaire, which consisted of a short metric and closed questions. A total of 494 students took part in the survey, from three faculties in three consecutive years.



### **Research review**

The first question examined was the motivation for choosing a university. In the first year, the most common response from students from the Management and Production Engineering department was to choose their studies according to their interests, immediately followed by the response that the department had been recommended by people who had studied or were still studying in the department, while the least frequent response was that it was their preferred course of study in the first place. In the following year, responses ranked similarly. The most common response was to choose their studies according to their interests, and the least frequent response was for students to say that they chose this course because they did not get into another course. The final year surveyed differs significantly from the others. The most frequent answer was preferred course of study in the first place, and the least frequent answer was that they chose the course because it was recommended by friends.

When asked why they chose to study at the University of Agriculture and Forestry in Kraków in the same years, students from the Agriculture and Forestry Technology course were almost unanimous in stating that they chose their studies in accordance with their interests, i.e. it can be said that this was a conscious and planned choice rather than a quick and hasty decision.

Students majoring in Renewable Energy Sources responded similarly in the years surveyed. The most common answer given by students was, to choose their studies according to their interests, i.e. a fully considered and responsible, they chose a course of study that interested and interested them, and the fewest voted that it was their preferred course of study in the first place and that they did not get into another one. This means that the choice was not random. Taking into account the number of votes cast for these answers, it can be concluded that the University of Agriculture was not the only university to which students applied, but it was not a fallback either.

On the other hand, when asked what sources they used to find out about the educational offer in the first surveyed year, students of Management and Production Engineering most often answered that they sought information from friends or family. Most often, students reached for information from their friends or colleagues who were to some extent connected with the given university, what they had heard about it or what they studied there directly. The second most frequent answer was the University's website as well as the Faculty's website, and the least information about the offer of education was found out from secondary school teachers. In the following year, most respondents voted for the University's website and least for information provided by facebook. In the third year, the University's website and the Faculty's website were the most helpful and the least helpful.

High school teachers and information guides have proved to be effective for obtaining information. This is mainly due to the fact that young people tend to use electronic information, as this is more convenient for them and allows them to obtain the information they are looking for at any time and in any place they are in. Therefore, guides are "going by the wayside".

On the other hand, respondents from the Agricultural and Forestry Technology faculty, when asked in the first year, what sources they used to obtain information on the offer of education at the University of Agriculture in Kraków, answered that they most often used help, suggestions from family and friends, but also, in the age of the Internet, the websites of the Faculty and the University proved to be helpful, while the least helpful were open days, facebook and teachers at the secondary school. In the two subsequent years, the University's website was definitely in first place, as it provided the students with the most helpful information about the educational offer of the University, while facebook and information guides were the least helpful.

On the other hand, students majoring in Renewable Energy in the first year of the study most often used the University's information sheets and website. The least helpful were open days at the University as well as the Faculty website. In the following years, respondents found the Department's and the University's websites helpful, while Facebook proved to be the least effective tool for obtaining information about the offer of education.

Given the above, it can therefore be concluded that the websites of the University of Agriculture are becoming more popular with students every year, with more and more students going there to find out about the range of courses on offer, the courses and other things offered by the university in Kraków.

Analysing the results of the Management and Production Engineering students surveyed, it can be concluded that the most important source of information they used was the Faculty website. It was on this website that the students found the information that was important to them and which they could not find on other communicators, guides or find out from friends or family. In the first year under review, the lowest scores were given to information guides and television, and in the next year to fairs and open days. It can be seen that after such low results, the university took appropriate measures and in the following year the fairs and open days proved to be more effective in attracting new students.

When asked what were the most important sources of information they used when choosing a university, the Agricultural and Forestry Technology respondents were almost unanimous in stating that the most helpful, in each of the three years of the survey, were the Department's and the University's web pages. The University places increasing emphasis on maintaining its web pages at the highest level, frequent updates, improved visibility of the information sought, interesting graphics contribute to frequent visits by prospective students and those studying at the University. In the years surveyed, respondents found that

information guides and television were the least helpful. Nowadays it can be said that young people's acquisition of any information is done via the Internet. Fewer and fewer young people watch TV and therefore respondents made the least use of this type of information medium.

In the questionnaire that was filled in by students of Renewable Energy in three consecutive years, they declared that they found most of the information they needed on the Faculty's website and facebook page. It was there that they found the information that allowed them to make a fully informed choice of this direction and found answers to questions that dispelled doubts in choosing it. In the years studied, the presentation at the secondary school was the least helpful.

The second most important source of information when choosing a major for Management and Production Engineering students in the first two years studied is the websites of the Faculty and the University, but they also obtained a lot of information through friends and family. In the last surveyed year, invariably the second best source of information turned out to be the websites of the University and the Faculty, but Facebook proved to be an equally authoritative way. In the first year surveyed, the least helpful source of information according to respondents was leaflets, and in the next two years the least helpful source of information according to respondents was education fairs.

Students from the Faculty of Agricultural and Forestry Technology declared that the second most important source of information about the University's educational offer that they used in the first surveyed year was the University's website, and the least they could learn from advertisements on the Internet. In the following year, the Faculty's website was the second best information medium for the respondents, and the least effective, according to them, were online advertisements, leaflets. Facebook was unequivocally identified as the second best source of information from which we can learn a lot about the University of Agriculture, the educational offer and the information that potential candidates most often look for.

The second most important way of obtaining information before a very important choice such as a course of study for Renewable Energy Sources in three consecutive years is the University's website, and the least votes, which may indicate unsatisfactory ways of obtaining information, were received by information guides and leaflets.

The authors also attempted to examine the usefulness of the website. The usefulness of the website is influenced by a number of factors, such as ease of searching for information, readability, graphics and interesting facts about the life of the university. Respondents from three fields of study, such as Production Management and Engineering, Agricultural and Forestry Technology and Renewable Energy Sources, rated the website on a scale of 1-5. Most students rated the website at 4, as it does not fully meet all the requirements expected by

the respondents. Among the students' responses, the most frequent answer was that it was lacking the most:

- the possibility of reviewing assessments,
- no minimum score thresholds required for recruitment,
- difficulty in finding the timetable,
- accurate information about the first-year student research grant,
- lack of information on organised courses.

At this point, it should be noted that these were only first-year students; it can be assumed that the opinions of students from older years on the attractiveness of the faculty's website would be somewhat different

## Conclusions

From the student survey, the marketing at the Faculty of Production Engineering and Energy is thriving. Therefore, the aim of the survey was achieved, as Autorm was able to establish that the promotional activities undertaken by the university are effective and directly influence the choice of university by future students. The necessary information is updated on a regular basis on the websites, which is why they are so popular, where one can obtain a lot of necessary information as well as read a lot of interesting facts. The managers of these university business cards take care of every detail and the constant updating of the websites allows for development.

Every year, more and more students are looking for information on Facebook or other platforms. It can be seen that information guides, presentations at secondary schools, fairs or leaflets of any kind are becoming a thing of the past. Invariably for the past three years, one of the most popular forms of acquiring knowledge has been both the faculty and university websites. In the age of the internet, this is one of the easiest forms of communication with the public. Today's young people cannot imagine functioning properly without access to Facebook and other communication platforms, so all kinds of changes in the life of the institution should be updated in such places or on websites so that such information can reach the widest possible audience.

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## FACTORS DETERMINING THE CHOICE OF UNIVERSITY BY CANDIDATES

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**Abstract.** *The presence of non-public schools on the Polish higher education market has led to increased competition and constituted a fundamental incentive to introduce marketing management in universities, both public and private. The educational services market is dominated by price competition, supported by promotional activities. Image and price are the two most important reasons for taking up studies at a given university, and the image is a particularly important source of building a university's competitive advantage. However, between public and private universities in Poland, there are significant differences in terms of image structure. The aim of this article is to examine what identity factors are decisive for candidates, what sources of information about the university were most important for candidates.*

**Keywords:** *competitive advantage, higher education, image, promotion.*

### Introduction

A noticeable phenomenon in Poland is the growing surplus of university places in relation to the number of applicants and intensifying competition for students (Michno, Lib, 2019). Universities forced to fight to maintain their position, and often even to survive in the market, are verifying their current methods of operation by, among other things, reducing operating costs, but also looking for more effective methods of competition (Azoury, Daou, Khoury, 2014). Classic methods (competing with the program offer, its quality and price) are no longer sufficient. Intangible resources are increasingly becoming the leading differentiator of universities (Miotto, del Castillo, Blanco-Gonzales, 2020). Since universities of a given type have a similar offer of majors and specializations (curricula of about 50% shaped by teaching standards), the image - next to the price - becomes a factor influencing the attitude of a future student to evaluate the offer and make a choice. Increasingly, therefore, universities are taking steps to create a desirable image and, on this basis, shape their operating and development strategies (Sojkin & Golata, 2020) This is a multi-faceted

process, because image creation affects the quality of the functioning of the entire institution (Kotler, Armstrong, Saunders, Wong, 2002). In order for these differentiators to fulfill their primary task and contribute to a competitive advantage in the market, they must be effectively positioned in the minds of the public (Altkorn, 2004)

The components of identity are not obvious to all people who are in the field of interest of the organization, so its goal should be to communicate the identity as accurately as possible. The main purpose of this paper is to analyze what image factors are decisive when deciding on the choice of a university, and whether there is a difference between the images of public and non-public universities? The paper verifies the following specific research hypotheses:

H1. Image and price are the two most important considerations in choosing to study at a particular university.

H2. There are differences between public and non-public universities in terms of image structure.

### **Evaluation of factors influencing the choice of public and non-public universities. Research results**

The starting point for the selection of the sample was the ranking of "Perspektywy" universities containing a list of 102 universities (Perspektywy, 2020) From the ranking, economic universities were selected by creating two lists: public economic universities and non-public economic universities. The survey was conducted among Polish economic universities according to the criterion of place in the ranking of "Perspektywy" magazine. From the ranking, a list of public universities (P) and a list of non-public universities (N) were selected. A stratified, single-stage random drawing was used (population elements were drawn once), with no returns, i.e. each university could be drawn only once. The survey covered first-year students beginning their studies at a given university in the number of 30 - 35 students/university. A total of 18 universities were surveyed: 9 public and 9 non-public. Students were given links to the questionnaire. In the end, 630 students completed the questionnaire digitally. 300 from non-public universities and 330 from public universities. In addition, each list (i.e. the list of public universities and the list of non-public universities) were divided into 3 groups: P-1 top ranked public universities in the ranking, P-2 middle ranked public universities, P-3 final ranked public universities) and N-1 top ranked non-public universities in the ranking, N-2 middle ranked non-public universities, N-3 final ranked non-public universities.

Qualitative research is quite commonly used in image research, as it allows to capture associations and attitudes associated with the university. However, due to the objectives set and the scope of the study, it was decided that in this case quantitative methods would be more appropriate. An online questionnaire was

designed, for first-year students, with open, semi-open and closed questions. The form included a metric to verify important data for the reliability of the study, including the name of the university, field of study, full-time or part-time mode, year and gender of respondents. Deciding on the choice of a university is usually a lengthy process in which various elements are taken into account. First-year students at all surveyed universities were asked which identity anchors most influenced their choice of university. The factors were rated on a point scale from 1 to 5 (where: 1- unimportant importance, 2 - low importance, 3- fairly high importance, 4 - high importance, 5 - very high importance, most important). The results are presented in several levels: for the surveyed universities in general, for the surveyed public universities and for the surveyed non-public universities.

**Results for all universities combined.** The results for all surveyed universities in total show the following structure of responses (Tab.1):

- the highest rating (above 4) was given to two factors: the majors and specialties offered (4.27) and the chances for a good job in the future (4.11). Thus, these are important factors for potential students, largely influencing their choice of university,
- below the rating of 4, but above 3.5 were such factors as: high level of teaching (3.82), reputation (good opinion) of the university (3.67), location of the university (3.6), friendly approach of lecturers to the student (3.56).

The results show that students primarily look for a university that is in line with their vision of their future profession and that offers job opportunities. They further take into account the level of teaching and reputation, i.e. the prevailing opinions about a particular university. The top five most highly rated factors also include the location of the university. Among the factors rated as rather important were: modern teaching methods, good opinions on the qualifications of the scientific and teaching staff, practical training, the level of foreign language teaching, the lack of an entrance exam and attractive material base of the university. Of low importance are, among others: the possibility of realizing part of the studies abroad, the positive, strong presence of the university in the media, the possibility of studying in English, the rating given to the university by the Polish Accreditation Commission and the positive assessment of the amount of tuition fees in relation to other universities. The university's advertising campaign was considered an insignificant factor, and it received the lowest score (1.92). In light of these results, it can be concluded that the university's advertising campaign has little influence on the decisions made by university applicants. An analysis of the responses given by first-year students of the surveyed public universities shows that the most important factors in choosing a public university are the chances of a good job in the future (4.25) and the fields of study and specialties (4.24). At the same time, these are the same factors that were considered important in the survey of all students. Also repeated in the top five



are high level of teaching, reputation and location as rather important factors. A number of factors received a score of less than 2, meaning that their importance is low. These include the university's presence in the media, the opinion of parents, the rating given to the university by the Polish Accreditation Commission, the university's advertising campaign, a positive assessment of the amount of tuition fees in relation to other universities, and the possibility of studying in English.

*Table 1 Factors influencing the decision to choose a university - results for students of the surveyed universities in a cross-section of public and non-public universities (compiled by authors)*

Factors influencing the choice of universities	Universities overall	Public universities	Non public universities
Education directions and specialties	4,27	4,24	4,29
Opportunities for a good job in the future	4,11	4,25	4,02
High level of teaching	3,82	3,97	3,72
Reputation (good reputation) of the university	3,67	3,96	3,52
Location of the university	3,60	3,65	3,57
Friendly approach of lecturers to the student	3,56	3,02	3,87
Modern didactic methods	3,41	3,06	3,63
Good opinions on the qualifications of the scientific and teaching staff	3,35	3,02	3,55
Practical education	3,34	2,95	3,57
Level of foreign language teaching	3,24	3,01	3,38
No entrance exam	2,97	2,67	3,15
Attractive material base of the university	2,96	2,79	3,07
Recommendation of a friend or other person	2,95	3,04	2,90
Scientific achievements of scientific and teaching staff	2,91	2,48	3,17
The place occupied by the university in press rankings	2,87	2,96	2,82
Opportunity to pursue your interests in other areas at the university	2,80	2,86	2,77
Opportunity to pursue part of your studies abroad	2,49	2,47	2,50
Positive, strong presence of the university in the media	2,38	1,98	2,65
Ability to study in English	2,23	1,68	2,57
Rating given to the university by the Polish Accreditation Commission	2,22	1,95	2,41
Positive assessment of tuition fees in relation to other universities	2,22	1,72	2,54
Parents' opinion	2,06	1,96	2,12
University advertising campaign	1,92	1,78	2,00

Factors considered important in choosing a school are, in the opinion of students of non-public schools, the fields of study and specialties (4.29) and the chances for a good job in the future (4.02). The results in this regard coincide with the opinion of students of public universities (Tab. 2). This shows that regardless of the type of university, potential university candidates first analyze the fields of study offered by the school and the extent to which studying at a given university will increase the chances of getting a good job. Students of non-public schools attribute greater importance than students of public schools to such factors as price (2.54, in public universities 1.72) which can be linked to the full payment of full-time and part-time studies in non-public universities. Higher ratings were also given to modern teaching methods (3.63, in public universities 3.06) or the opportunity to study in English (2.57, in public universities 1.68). Based on this, it can be concluded that students perceive non-public universities as using more modern teaching methods and offering studies in English to a greater extent than public universities. A lower rating is given to reputation (3.52), which ranked ninth out of 23 evaluated factors (3.96 in the assessment of public university students). Thus, reputation is more important in choosing a public university.

*Table 2 The five most important factors in choosing a public university (compiled by authors)*

The five most important factors in public universities from the first ranking group	Rating (average descending)
Education directions and specialties	4,52
Opportunities for a good job in the future	4,43
Level of foreign language teaching	4,08
High level of teaching	4,04
Location of the university	3,82
The five most important factors in public universities from the second ranking group	Rating (average descending)
Reputation (good reputation) of the university	4,58
Chances for a good job in the future	4,50
High level of teaching	4,25
Education directions and specialties	4,16
Place occupied by the university in press rankings	3,91
The five most important factors in public universities from the third ranking group	Rating (average descending)
Chances for a good job in the future	4,50
Reputation (good reputation) of the university	4,41
Education directions and specialties	4,25
High level of teaching	4,09
Location of the university	3,91

In summary, the most important factors in choosing a public university (regardless of its ranking) were: fields of study and specialties, chances for a good

job in the future, and a high level of teaching. The reputation and location of the school were also highly rated. On the other hand, the most important factors in choosing a non-public university (regardless of its place in the ranking) were such factors as: education majors and specialties and chances for a good job in the future. Thus, the same two factors were considered decisive for both public and non-public university applicants.

The results indicate that students treat their studies as an investment in their future position in the labor market. The advantage, therefore, goes to a reputable university that offers university candidates the fields of study they are looking for, provides quality education, increases their chances of finding a job, and has a good location.

## **Discussion**

Reputation is more important for public schools (3.96) than for non-public schools (3.52), which may be related to the longer tradition of public universities and, consequently, their greater recognition. However, it also has a strong influence on the selection of non-public universities from the first places in the ranking (the second most important factor with an average score of 4.28). In both types of schools, students expect a high level of teaching (overall rating of 3.82, including 3.97 in public universities and 3.72 in non-public universities). The friendly attitude of lecturers toward students is also important (overall rating of 3.56), although this factor was much more important in non-public universities (3.87) than in public universities (3.02). This is probably related to the fact that non-public universities are more concerned than public ones with attracting and retaining an adequate number of students (tuition fees for non-public universities are an important source of funding for studies). Candidates also pay attention to modern didactic methods (3.41), the level of foreign language teaching (3.24) and whether the university educates practically (3.34). In both types of schools, recommendation is important (rating of 2.95, including 3.04 in public universities and 2.90 in non-public universities), which indicates that positive opinions about the university influence the choice of candidates. The leading factors determining the choice of a university in the cross-section of the type of university are similar, but in the case of non-public schools, aspects of credibility (PKA rating, recommendations, opinions on the qualifications of the staff) and those related to a more modern, practical approach (practical education, foreign languages, modern teaching methods) are more important. The above analysis is supplemented by the students' responses to the open-ended question in the questionnaire: "What, in your opinion, prompted your fellow students to study at alternative universities?". The obtained answers (41 statements of students from public schools, 58 statements of students from non-public schools) were grouped

into categories according to the criterion of similarity. Thus, the following factor structure was obtained:

- tuition fees - 31 responses (10 P, 21 N),
- reputation (prestige) - 26 responses (16 P, 10 N),
- opinion of friends - 10 responses (5 P, 5 N),
- location (close to home) - 7 responses (4 P, 3 N),
- direction of study - 7 responses (4 P, 3 N),

In light of the results, it can be concluded that the answers to the open-ended question confirmed the importance of the most important factors influencing the choice of university.

A special group of factors affecting the image of the institution is the relationship of potential students with the administrative staff of the university, primarily the staff of the enrollment desk and the dean's office. Focus research at two universities (public and non-public) identified factors that determine the quality of service of these units (Tab.3, Tab.4). The responses received indicated such evaluation factors as competence, friendliness, being helpful, providing comprehensive answers and convincingly encouraging the choice of a particular university. This range of responses was included in the questionnaire for first-year students. In light of the results, it can be concluded that the quality of service provided by the enrollment center and dean's office is rated higher in non-public universities than in public universities. This difference persists when comparing the ranking groups (P-1 with N-1, P-2 with N-2, P-3 with N-3). Comparing the ratings obtained by public and non-public universities from the first ranking group, one can notice a clear advantage of non-public in the level of realization of such qualities as kindness and being helpful. Such a situation may be due to the fact that non-public universities attach more importance to relationship marketing, and place more emphasis on building the right relationship by front - line staff.

*Table 3 Enrollment point assessment by first-year students at public universities<sup>1</sup>  
(compiled by authors)*

Distinctive features of the recruitment point	P - 1	P- 2	P-3
They are competent	3,69	4,08	4,08
They are friendly	3,56	3,83	4,08
They are helpful	3,47	3,75	3,91
They provide comprehensive information	3,47	3,66	3,91
They encourage you to choose this school	3,47	3,33	3,75

<sup>1</sup> Designations P- 1, P-2, P-3 - are public universities from the first, second and third ranking groups, respectively.

**Table 4 Evaluation of the work of the recruitment point by first-year students of non-public universities <sup>2</sup>(compiled by authors)**

Distinctive features of the recruitment point	N- 1	N-2	N - 3
They are competent	4,33	4,37	4,04
They are friendly	4,30	4,42	4,01
They are helpful	4,30	4,43	3,96
They provide comprehensive information	4,20	4,20	3,87
They encourage you to choose this school	3,96	4,01	3,85

It is also worth noting that within the ranking groups, universities from the first ranking group (P-1) are the weakest. They were rated lower in this area than universities from the second and third ranking groups (P-2, P-3). On this basis, it can be concluded that the top economic public universities focus less than other schools on building a satisfactory relationship with a potential student (Tab. 4).

**Table 5 Evaluation of the work of the dean's office by first-year students of public universities (compiled by authors)**

Distinctive features of the dean's office	P - 1	P- 2	P-3
They are competent	3,86	4,00	4,00
They are friendly	3,54	3,66	3,54
They provide comprehensive information	3,22	3,58	3,45
They are helpful	3,22	3,50	3,45
They encourage you to choose this school	3,18	3,41	3,36

**Table 6 Evaluation of the work of the dean's office by first-year students of non-public universities (compiled by authors)**

Distinctive features of the dean's office	N-1	N-2	N-3
They are competent	4,33	4,23	3,88
They are friendly	4,33	3,90	3,77
They provide comprehensive information	4,20	3,92	3,69
They are helpful	4,10	4,04	3,66
They encourage you to choose this school	3,90	3,64	3,61

<sup>2</sup> Designations N- 1, N-2, N-3 - are non-public universities from the first, second and third ranking groups, respectively.

## Summary

The results of primary research conducted at eighteen economic universities in Poland, as well as the results of the preceding secondary research, presented in this chapter, made it possible to verify the underlying hypotheses. Synthetic conclusions are presented in the following conclusions.

Hypothesis No. 1 assumes that image factors and price are the two most important reasons for studying at a given university, and that image is a particularly important source of building a university's competitive advantage. In turn, from the point of view of students assessing the importance of factors influencing the choice of a university, the most important are the qualitative characteristics of the offer, the school's reputation, friends' recommendation, price and location. Image - in the approach adopted in the dissertation - understood as the perception of identity characteristics among the target groups of universities is of primary importance. The research shows that there are clear expectations about the needs that a university should meet. Schools that build their strategy on such identity anchors as high quality of education, faculties that increase the chances of finding a job, and student orientation (practical teaching, individualization of studies, modern didactic methods, cooperation with the environment, friendly approach) have a significantly higher chance of attracting students, and thus of surviving.

Hypothesis 2 assumes that there are differences between public and non-public universities in terms of image structure. Our own research only partially confirmed this hypothesis. Both public and non-public university students considered the following as the most important factors influencing their choice of university: fields of study and specializations, chances for a good job in the future, and a high level of education. The main motives for choosing a public university were chances for a good job in the future (4.25), education majors and specialties (4.24), high level of teaching (3.97), reputation (3.96) and location (3.65). On the other hand, the main motives for choosing a non-public university are education majors and specialties (4.29), chances for a good job in the future (4.02), friendly attitude of lecturers towards the student (3.87), high level of teaching (3.72) and modern teaching methods (3.63). In light of the survey, it can be seen that the factors that determine the choice of universities are similar, but in the case of non-public schools, aspects of credibility (PKA rating, opinions on the qualifications of the staff) and aspects related to a more modern, practical approach (practical education, foreign languages, modern teaching methods) and a friendly approach to the student are more important.

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## MASTER'S DEGREE IN LAW - PER ASPERA AD ASTRA BALTIC APPROACH

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**Abstract.** *The purpose of this article is to continue the discussion of experts and academic representatives on the necessary knowledge and examination formats in law studies in order to achieve the goal: providing the education of highly qualified lawyers to fully and responsibly implement the rule of law in democratic countries. Authors highlight the current trends and novelties in the Baltic States, which illustrate the transformation of the attitude of legislators and policymakers and the steps taken to ensure the highest standards in learning the legal profession. The article illustrates the differences in the procedure for obtaining a master's degree in Latvia, Lithuania and Estonia, which is related to the introduction of the national unified legal professional qualification exam in Latvia in 2021. The article summarizes the opinions of three academic staff and legal professionals from the Baltic States on how the master's degree acquisition process existing in the country provides guarantees for graduates' acquisition of quality education and the necessary professional skills.*

**Keywords:** *Centralized qualification exam, competences, examination methodology, legal education, transformations in the Higher Education, the Baltic States.*

### Introduction

A master's degree in legal sciences in every European Union member state means the result of many years of study, which paves the way for a successful graduate of master's studies to further work in the legal professions. In the European Union, the jurisprudence study process has been harmonized following the Bologna system. This has actually meant that in a number of countries the time required to obtain a bachelor's and master's degree has shortened overall. In some cases, this has also meant the reduction in the number of lectures or academic contact hours, exclusion of several study themes or even whole courses from the study process. Not always the "old study model" is the best and most effective, which is proven by the entry of many new teaching methods into higher education, including the process of studying law. Future challenges must be prepared not only for Law Faculties in European Union



member states, but also for the future job market of lawyers: from private companies to courts.

The article discusses and substantiates the peculiarities of legal education as a qualification for specialists in the field of management in public authorities, when performing certain functions related to the implementation of public authority (primarily state authority), which can only be performed by persons with legal qualifications - and thus legal education.

Considering the topic discussed in the article, the historical-comparative method, as well as the descriptive method, is mostly used. Any change in the national regulatory framework that applies to the educational process requires an analysis of the historical context. On the other hand, policy formation in the regulation of higher education criteria and universities does not take place without the initiative or at least the consent of the academic staff. In this context, it is essential, using the descriptive method, to identify those turning points, which, hopefully, in all cases, have always practically resulted in well-thought-out reforms, which lead to an increasingly high-quality provision of the excellence of knowledge necessary for the legal profession in the Baltic States.

The national unified qualification exam introduced in Latvia in 2021 was created as a result of discussions organized over many years, which were not always accompanied by unequivocal support. Considering the experience of the three small and similarly legally structured Baltic states, this article helps to reveal the extent of academic symbiosis and whether the first steps taken by Latvia to raise the quality bar of legal qualifications have inspired Lithuania and Estonia to similar processes.

### **Qualification of a lawyer - equal status, different procedure**

After regaining independence in all three Baltic states, the reform of the legal system, which meets the standards of a democratic and legal state, was an acutely important issue. This can only be provided by highly qualified lawyers who have mastered the legal methods and nature of law known in the Romano-Germanic family of law. This transition was primarily also facilitated by Latvian, Lithuanian and Estonian lawyers living abroad, who were ready to invest their knowledge in the development of legal thought in post-Soviet countries.

The relevance of the qualification of a modern lawyer is determined by the increasing legal regulation of social relations in a democratic society. Especially in the conditions of globalization, the previously prevailing non-legal nature of social relations is being radically changed by legal relations and their legal interpretation. It is no coincidence that the Constitutional Court of the Republic of Lithuania emphasizes that "in a democratic legal state, high demands are placed on the legal profession, because such demands help ensure such

fundamental legal values as the rule of law, justice, individual rights and freedoms, legal security and legal certainty, the right to a fair trial, etc." (LRKT, 2008). Thus, determining the requirements of legal education is an important part of public policy, and its management (administration) - the creation and justification of the system - is a prerequisite and at the same time a guarantee of effective public policy.

Based on the historical heritage, the main academic institution of higher education in Latvia was the University of Latvia, which was the only one that trained lawyers in the early 1990s. Therefore, in the regulatory acts, the legal qualification obtained at the University of Latvia - a master's degree - was the criterion for holding several positions in the highest legal professions. Given the high demand, the country developed a liberal approach to the creation of other universities where you can obtain a lawyer's qualification, however, the legal norms that assigned the diploma of the University of Latvia to an exclusive status did not change.

In Latvia, in 2002, the State Human Rights Office (now the Ombudsman) appealed to the Constitutional Court, pointing out the discrimination by which the laws of the University of Latvia had been placed "on a pedestal" in comparison with other universities for 10 years, for example, in the presence of the law's requirement that candidates for the positions of attorney, prosecutor and notary have a mandatory requirement have obtained a higher legal education at the Faculty of Law of the University of Latvia. If the education was obtained at another university, the opinion of the Faculty of Law of the University of Latvia on the scope and quality of the study program was required. The norms of the law, which were once objective and relevant to the specific situation - in the 1990ies when they were incorporated into the laws, the Faculty of Law of the University of Latvia was the only one that trained lawyers and could give professional opinions on their qualifications. As concluded by the Constitutional Court, "highest education in law in the State may be acquired at only one university type of higher schools – the University of Latvia and eight higher schools of the no university type. Thus, only on the basis of the above division any of the no university type higher schools may be considered as incomparable with the University of Latvia" (CC, 2002, para 4.1.).

Depriving the University of Latvia of its exclusivity rights in determining the compliance of education quality standards, the legal education market in Latvia was liberalized. For about 20 years, the fact of accreditation of the educational institution was the only procedural safeguard that maintained and guaranteed the quality of education.

Some years later (in 2008), the Constitutional Court of the Republic of Lithuania emphasized that persons aspiring to become judges must have acquired such a higher education that can be ensured only by the two-level sequential studies provided for in the legal acts of the Republic of Lithuania (i.e.

Bachelor of Law and Master of Law qualifications degrees) or integrated law studies, when the first and second-cycle university studies. Thus, a legal education, expecting the greatest career opportunities, severely limits the availability of such an education. Therefore both Baltic countries searched for the just solution of the legal regulation concerning the quality v availability of legal education in the country. In Lithuania, many law study programs are created in such a way that they meet the more strictly defined standards of higher university education for those seeking a career in the judiciary. At the same time, it narrows the opportunity for some citizens to gain a wider profile legal education, which includes the competencies required for civil service. Some Lithuanian authors defined this approach to legal studies as “conservative and traditional”, emphasising that it has been “criticized for its inherent inability to recognize the need for a broader range of skills and competences necessary for a modern legal professional” (Pasvenskiene, Astromskis, 2020). While agreeing that the Constitutional court is legitimized to define the necessary qualification level of lawyers in order to ensure quality standards of the functioning of the state organs.

### **Quality of Legal Education – State Issue**

Since the introduction of the Bologna process in higher education the EU country universities mutually recognize the diplomas issued by other EU state universities based on similar criteria and education standards. Nevertheless, in practice the quality might vary. It is no secret that in each of the Baltic states concerns have been raised whether the master’s diploma reflects the graduate's quality education and practical legal skills according to the methodology. Each of the Baltic states have approached this issue from a different perspective: from focus to the content of study process (Lithuania), by discussing on the general exam for candidates who wish to apply to state offices (judiciary, notary, advocate, prosecutor) in Estonia and, finally, by introducing a Uniform state professional qualification examination of a lawyer in Latvia.

As Beinoravičius, Vainiute and Bileišis (2015) have stressed, in Lithuania the discussion on the quality of legal education and the examination procedures have been closely linked with the discourse on the civil service in Lithuania, therefore shifting the focus from formal education to practice- oriented education. At the same time universities mostly orientate to such a content of a legal qualification that is most suitable for judicial branch of the state power. Applicants to the Lithuanian civil service must have a professional qualification. Only persons with a higher university education can apply for the position of the highest category (level A) civil servant. But in Lithuania law study programs prepare specialists for a wider labor market than just the state service. Accordingly, in the process of training specialists, higher education institutions

must accept deciding what part of the study process should consist of managerial and leadership and general competences and what part of professional competences. As demonstrated by the concepts of qualification analysis, all professions provide for the requirement to have certain organizational and self-management knowledge, abilities, and skills (Bileišis, Beinoravičius, Vainiutė, 2015).

In Estonia, both the content of legal education and the educational requirements of legal vocations have been debated for years. Over the years, ideas have been put forward on how to prepare lawyers who are better able to cope in practice. Already in 2011, Estonia's current Chancellor of Justice expressed concern about the negative effects of mass higher education and the fact that legal education does not always meet the needs of the labour market (Madise, 2011). Ten years later, on 3 May 2021, the Supreme Court published an analysis of legal education and the legal profession, which highlighted, among many other problems, the underfunding of legal education, the lack of clear national requirements for law curricula, the fact that 3+2 education does not guarantee proper quality, and the organisation of professional exams for lawyers is fragmented and geared towards over-specialisation (Riigikohus, 2021). This analysis was followed on 7 June 2021 by a public appeal on the quality of legal education and legal services by representatives of different legal sectors, expressing concerns about the quality of legal education and proposing solutions to improve the situation. Among the suggestions were, for example, that 3+2 studies should be replaced by comprehensive integrated studies, that the state should fund the training of lawyers with only academic qualifications and only at one university, and that a common professional examination should be established (Kõve, Pilving, Andresen, 2021). On 14.06.2021, the Supreme Court, the University of Tartu and the Estonian Academic Law Society organised a conference "The Future of Legal Education", where it was agreed that legal education should be reformed (KEE, 2021). Under pressure from legal practitioners, the Minister of Justice promised to set up a working group to discuss the possibility of organising a common basic examination for legal professions (the so-called "the lawyers' exam"), in addition to the professional examinations.

In 2022, Ministry of Justice came out with a draft proposal for the regulation of a common professional examination for legal professions. (JUREE, 2022) It requires that in the future, anyone wishing to work as a lawyer, prosecutor, judge, assistant judge, notary, bailiff or bankruptcy trustee will have to pass a the lawyers' exam (MJEE, 2022). The same requirement will apply to the representation of individuals in court. The lawyers' exam is intended for lawyers who have obtained a Master's degree in law from a higher education institution, in order to assess their ability to perform their work to the level of a holder of a Master's degree in law valid in Estonia, if they wish to apply for the

above-mentioned legal offices. Passing the examinations is also a prerequisite for a lawyer to be able to represent a person in court. The exam focuses on case law and assesses legal reasoning rather than factual knowledge. Law graduates who fail the exam can retake the exam for a fee. The exam is administered by the Supreme Court and conducted by an examining board. The idea behind this exam is to introduce a common exam for all legal professions to ensure free movement between professions. At present, each professional association (judges, lawyers, etc.) has its own professional standards, its own system of quality assurance, which is ensured by the exams organised by that association.

On 21.02.2023, the Ministry of Justice sent the draft Law on the Lawyer's Examination Act for approval, in principle in the form and with the justifications described in the drafting intention (EXLEX, 2022, Ministry of Justice, 2023). Chancellor of Justice Ülle Madise, among others, has expressed her opinion on the draft law, noting that the introduction of a single exam for lawyers will not solve the problems it is intended to solve, but will create additional resource costs. A state-recognised law degree should mean that a student has acquired sufficient knowledge of all branches of law, understands the structure of the legal order, is able to navigate legal sources and solve cases. Depending on your choice of specialisation, you will have to keep learning, specialise and, if necessary, take part in competitions. There is a definite need for narrowly specialised lawyers, but specialisation cannot take place before a 'classical' legal education. Specialisation does not mean a lack of legal education, but additional knowledge and skills in a specific field (Madise, 2023). In 2024, this law has not yet entered into force.

While in Estonia the discussions have not brought the deserved reforms yet, the first Uniform state professional qualification examination of a lawyer in Latvia took place already in 2021. It is a periodic procedure (winter and summer exams) held in universities in different cities. The examination is constructed in a five- cycle format - five exams in separate days on following fields (three theoretical questions and one practical case (task):

- a) law, philosophy of law, and history of the law of Latvia;
- b) civil law, rights of civil procedure, and commercial law;
- c) constitutional law, administrative law, and rights of administrative procedure;
- d) criminal law and rights of criminal procedure;
- e) international law and law of the European Union.

Successful candidate must pass each component of the fields (by receiving minimum grade 4 on a 10-point scale. Since the introduction of the exam, five exams have been held and 418 students have taken the exam. Of these, 230 or 55% have received a successful assessment. Among them, 116 students passed the exam on the first attempt (28% of all who tried to take the exam), and 114 - on a repeated attempt (27%) (JV, 2023).

The necessary preparatory materials are available (TMLV, 2023):

- a) framework annotations of the theoretical part (containing topics that may be asked in the national exam (not exact exam questions), for example: Means of coercive influence applicable to legal entities; Insurance contract, its conclusion, content, entry into force, counterparties, etc. subject rights and duties; Saeima. Composition and functions. Members of the Saeima: status, mandate, immunity of the member; The basic norm, the hierarchy of normative legal acts in Kelzen's works (legal positivism).
- b) The state exam questions and assessment guidelines are provided for the previous examinations.

One of the most prominent authors of the idea on the State examination is current judge to the European Court of Justice Prof. Ineta Ziemele, who has outlined several possibilities for the future development of the procedure of the examination:

- Creation of the database of theory questions, which would be accessible to everyone, as it would function also as a good teaching tool in practice in law faculties;
- To ensure greater unity in what and how study material is provided to students before the exam (annotation, sources), stressing that also doctrinal indications must be agreed upon (Ziemele, 2023).

An original viewpoint has been developed by A.Kriviņš, stressing that a comprehensive exam after 5 years of study is ineffective. Instead, the basic subjects such as theory of law, philosophy of law and history of law of Latvia could be examined already after completing the bachelor's program and successfully passed if evaluation "good" (7 out of 10) is obtained (Kriviņš, 2023). There are no signs that such a proposal might be discussed in the Ministry of Justice or wider legal academia.

## **Conclusions**

When examining the concept of qualification of a lawyer, one has to rely on the general concept of qualification, in which the term "qualification" is understood from a narrow and broad point of view. When looking for the equivalent of these approaches in legal science, it is appropriate to refer to two categories of lawyers - legist and jurist, if law is identified with the law, then from the point of view of legal practice, priority is given not to justice, but to legality. The qualification of a lawyer based on the primacy of legality means a legal lawyer (lat. lex - law), who is required to have a good knowledge of laws, the procedures for their application, and to apply them accurately (to qualify acts contrary to the law, to form the texts of legal application acts, etc.). Therefore,

the qualification of a legal practitioner is the qualification of a more or less passive (in relation to the law) executor.

The three Baltic states currently exercise different approach towards examination procedures to obtain qualification of a lawyer (master's degree). As a reaction to concerns regarding the quality of legal education in Latvia a Uniform state professional qualification examination of a lawyer was introduced. Although the results of the graduates of the University of Latvia are generally higher, in author's opinion it is just a matter of time when other universities will find the best "know how" to prepare their students with equal or even better results. The necessity of the examination is undoubted. Although very similar problems regarding the quality of legal education (liberalization of legal education, high market demand which brought to lower criteria for obtaining master's degree) also were recognized in Estonia the policy makers have not found consensus on the form and organization of a state uniform examination (only for those persons who wish to enter the judicial professions – advocate, judge, notary etc).

In Lithuania, the procedure of obtaining the master's degree in law still remains in the hands of each University and no centralized examinations are foreseen in the nearest future. Although three different solutions might be recognized in three Baltic states, the quality of legal education is recognized as a crucial aspect of securing the rule of law in contemporary states oriented towards justice and European values.

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# NAVIGATING EVOLVING LANDSCAPES: A PRACTICAL ANALYSIS OF ACCOUNTANT'S PROFESSIONAL COMPETENCE IN UPDATED TRENDS

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**Abstract.** *As the accounting profession continues to evolve in response to technological advancements, regulatory changes, and shifting business landscapes, this article aims to explore the updated trends for accountant's professional competence drawing parallels with practical considerations of experts within the field. Using a content analysis method, the study draws insights from a meticulously conducted questionnaire, providing a comprehensive overview of the accountant's professional competence deemed crucial by accounting experts in navigating the dynamic challenges of today's financial environment. The findings shed light on the practical implications of accountant's professional competence, offering valuable insights for both aspiring and seasoned professionals seeking to stay abreast of the rapidly changing trends in the accounting domain.*

**Keywords:** *accountant, environment, professional competence, updated trends*

## Introduction

International Federation of Accountants (IFAC) highlighted the evolving landscapes in accountant profession by contributing to the development of high-quality standards and guidance, facilitating the adaptation and implementation of them, emphasizing the transformation of professional competence aspect in updated trends, where the creating value is in the role of professional accountants (International Federation of Accountants (IFAC), 2015). For any professionals, including accountants, adherence to high-quality standards and guidance is crucial, while the professional competence is not limited to only this.

According to the World Bank report, professional competence is an essential component of the accounting profession. It covers the core knowledge in the field, emphasizing the core skills and competences in order to fulfil the main responsibilities in a proper way. While the accounting field is continuously changing in today's fast-paced world, as new laws and technologies are introduced. Therefore, in order to stay relevant and competitive, accountants have

to maintain an up-to-date level of professional competence (Hodge, Kabuya, Begtasevic Rudalija, 2019).

As the ability to carry out relevant tasks with a predetermined level of proficiency in the real world is called competence. While the specified proficiency cannot be attained by only knowledge and understanding, the necessary practical experience should be gained, applying the unique skills and traits in an effective manner afterwards. Moreover, professional competence in the accounting context refers to the capacity to exhibit the values, ethics, and attitudes, as well as technical and professional skills, at a proficient enough level in a way that satisfies the needs and expectations of employers (Borgonovo, Friedrich, Wells, 2018).

So, there is a need to transform the preparation process of accountants, following the current changes in the world and economy (Orban, Kiss, Bacs, 2016), the updated trends and perspective (Cunha, Martins, Carvalho, Carmo, 2022) and how to be prepared for these future challenges (Sangster, 2022) and global shifts (Oladele et al., 2021) and be equipped with the necessary skills for a changing industry (Tandiono, 2023), paying special attention to the professional competence of accountants.

Moreover, the primary tenets of the preparation of accountants should cover the corresponding knowledge and understanding of the field, while offering new practical knowledge and up-to-date information, emphasizing the role of digital solutions (Orban, Kiss, Bacs, 2016).

Using a content analysis method, the study draws insights from a meticulously conducted questionnaire, providing a comprehensive overview of the accountant's professional competence deemed crucial by Latvian accounting experts in navigating the dynamic challenges of today's financial environment. The findings shed light on the practical implications of accountant's professional competence, offering valuable insights for both aspiring and seasoned professionals seeking to stay abreast of the rapidly changing trends in the accounting domain.

## **Literature Review**

In the dynamic landscape of the accounting profession, firstly, there is a need to specified the core requirements, forming its competence. The concept of competence offered by Cambridge University Press & Assessment was used for the current study. Specifying it as the ability to integrate and apply contextually-appropriate knowledge, skills and psychosocial factors (values, attitudes, etc.) to consistently perform successfully within a specified domain (Vitello, Greatorex, Shaw, 2021).

So, by forming the theoretical background for the research the articles covering the professional competence of accountants were analysed, specifying knowledge, skills, values and attitudes.

Table 1 **Generalization of Professional Competence of Accountants** (created by authors)

Authors/Year	Type of analyses/number	Core findings
(Rufino, Payabyab, & Lim, 2018)	125 questionnaires	Accounting and finance knowledge (financial reporting, statements; accounting standards); organizational and business knowledge (problem solving); information technology knowledge and general knowledge; interpersonal skills; communication skills (oral/writing); intellectual skills (creativity, objectivity, accuracy);
(Borgonovo, Friedrich, Wells, 2018)	6 case studies (Poland, Serbia, South Africa, the Philippines, Ghana, Palestine)	Competency framework: Knowledge topics (standards); competency statements and levels of proficiency; competency domains (accounting, audit, strategy, communication)
(AICPA & CIMA, 2022)	130 organisations (14 countries) - face-to-face interviews; round tables in 20 countries; ~ 5,000 responses to online survey	Accounting competency framework was formed: digital skills (digital literacy, data processing); technical skills (financing, accounting, law); business skills (management, problem-solving, analytical thinking); leadership skills (continuous professional development) and people skills (communication, collaboration), emphasizing ethics, integrity and professionalism
(Tandiono, 2023)	20 studies	accounting industry is being impacted by continuous advancements in information and communication technology; up-to-date accounting curricula; potential of AI; digital transformation
(Elo et al., 2023)	20 studies	Technical skills and knowledge (financing, accounting knowledge, juridical knowledge, research skills; computer, information technology, data processing skills; interpersonal, social and communication skills; intellectual skills (problem-solving, critical thinking, analytical thinking, logical skills); other professional skills (continuous learning, flexibility, creativity, objectivity, morality).

Rufino, Payabyab and Lim (2018) highlighted three core elements of accountant professional competence: knowledge, skills and values (Rufino, Payabyab, & Lim, 2018). While, in 2022 the Association of International Certified Professional Accountants updated 2019 Competence Framework for accountants, placing digital skills in the centre and listing four other skills as technical (finance management), business, leadership and people skills (interpersonal attitudes),

highlighting additionally such values as ethics, integrity and professionalism (AICPA & CIMA, 2022). Moreover, Elo, Pätäria, Sjögréna, and Mätt in 2023 emphasized the transformation of accounting work, that influenced the professional competence accordingly, adding corresponding digital transformation requirements (Elo et al., 2023).

In the context of current study, a generalization of the literature analyses is presented in Table 1, emphasizing core criteria and indicators for the professional competence of accountants.

By drawing parallels of the specified authors and following the competence concept mentioned above, the list of knowledge, skills, values and attitudes of professional competence of accountants was developed forming the theoretical framework for the study. This provides a comprehensive understanding of the professional competence required within the account domain (see Figure 1).

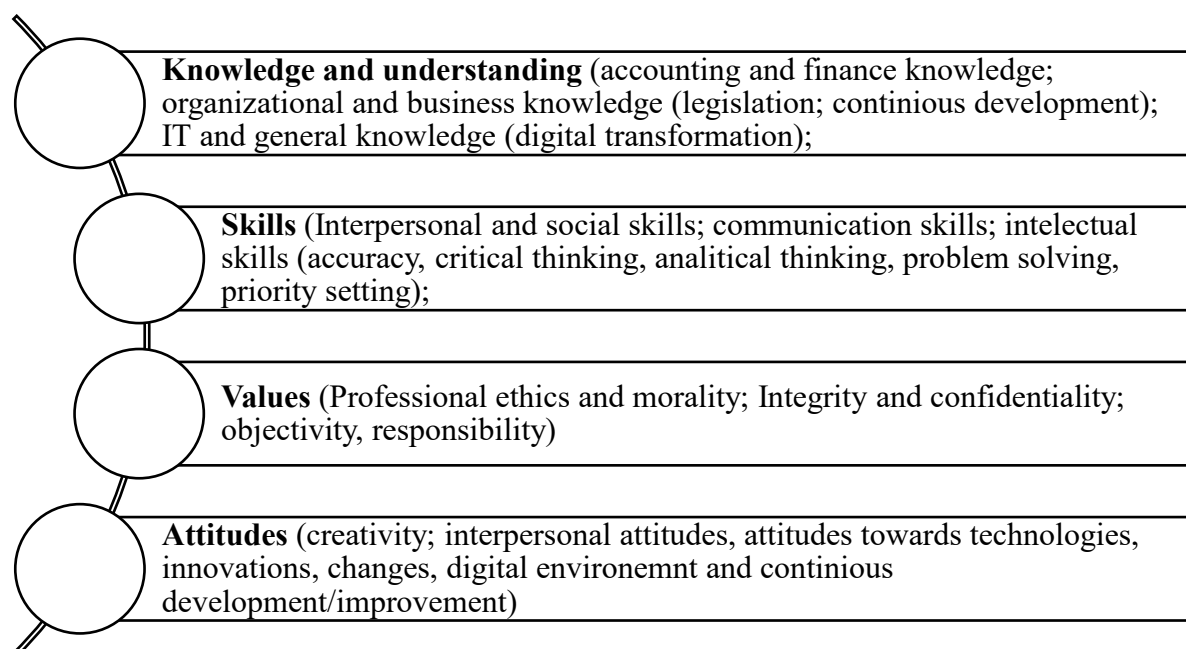


Figure 1 *Framework of Accountants' Professional Competence* (created by authors)

As in today's rapidly evolving business landscape the integration of IT is inevitable making IT competence indispensable for professional accountants (Damasiotis et al., 2015). While, failing to integrate IT into accounting education and daily work creates a significant gap, leaving aspiring accountant not-prepared to navigate the modern digital landscape (Kroon, Alves, 2023).

Besides this Artificial Intelligence (AI) offers accountant a multitude of benefits, including enhanced efficiency through automation of repetitive tasks like data entry and reconciliations, improving accuracy in financial reporting and analyses (Cunha, Martins, Carvalho, Carmo, 2022) and offering predictive

analytics, identifying trends and patterns needed for strategic planning and risk management (Tandiono, 2023).

Thus, the reshaping of accountant curriculum is imperative to equip future professionals with the essential skills and knowledge required in an era dominated by technological advancements like AI, offering the corresponding study programs for digital literacy and effective data analytics (Sangster, 2022).

### **Research Methodology**

The current study is based on non-experimental mixed research design, related to the analyses of quantitative and qualitative data on accountants' professional competence. The survey was conducted in November 2023 – January 2024. Eleven experts from accounting field with professional experience more than seven year took part in the survey. The specifics of account work – private or public – were not considered.

The questionnaire consisted of two sections. Section 1 was grouped following the above-described theoretical framework. 28 indicators were offered for evaluation in accordance to Likert scale (from 1 – not important to 5 – significantly important) for the four core categories: knowledge/understanding, skills, values and attitudes. Each specified category included seven indicators. While, Section 2 included five open-ended questions concerning the additional requirements for the same four categories and one question about the current educational offer for accounting studies.

One technique for gathering qualitative data is the open-ended question method. Determining the narrative's meaning by delving into it is the aim of qualitative analyses. This is why the content serves as the foundation for the analysis. According to Kroplijs and Raščevska (2004), there are three steps involved in qualitative coding: content unit (specific and concrete), category (general, abstract and expressed in scientific language), and concept (scientific, related to theory) (Kroplijs, Raščevska, 2004).

### **Research Results**

The survey results reflect the insights of eleven accounting experts, each possessing over seven years of practical experience. 9 women and 2 men took part in the survey, presenting Latgale (9), Vidzeme (1) and Zemgale (1) regions. It is important to indicate that 3 respondents are connected with the teaching process of accountants. The demographic variable of respondents' age varies from 28 to 60 years old. 28 indicators were listed in Section 1 of the questionnaire. The data were coded using a 1-5 Likert scale to measure respondents' perceptions and attitudes towards the offered statements. The data obtained are reflected in Table 2, showing MEAN value as a central tendency.

According to the survey data, the highest total mean was observed for Category III – 4,79; while the lowest for Category I – 4,43. The overall mean of the survey was 4,62. In addition, the highest index of 5,00 was observed for three indicators: Legislation from Category I, Accuracy from Category II and Responsibility from Category III.

Table 2 *Questionnaire Section 1 Data Analyses (made by Authors)*

Indicators	MEAN N=11
<b>I. Knowledge/ Understanding</b>	
1.1. Accounting Standards	3,73
1.2. Implementation of Regulating Standards	4,18
1.3. General business management	3,91
1.4. Finance	4,73
1.5. Legislation	<b>5,00</b>
1.6. Continuous professional development	4,82
1.7. Digital transformation	4,64
<b>II Skills</b>	
2.1. Programming literacy	4,91
2.2. Accuracy	<b>5,00</b>
2.3. Effective communication	4,45
2.4. Critical thinking	4,55
2.5. Problem solving	4,36
2.6 Priority setting	4,73
2.7. Analytical thinking	4,91
<b>III Values</b>	
3.1. Ethics	4,73
3.2. Morality	4,55
3.3. Integrity	4,82
3.4. Confidentiality	4,82
3.5. Objectivity	4,73
3.6. Responsibility	<b>5,00</b>
3.7. Professionalism	4,91
<b>IV. Attitudes</b>	
4.1. Creativity	4,00
4.2. Interpersonal attitudes	4,36
4.3. Attitudes towards technologies	4,91
4.4. Attitudes towards innovations	4,64
4.5. Attitudes towards changes	4,55
4.6. Attitudes towards digital environment	4,73
4.7. Attitudes towards continuous development/ improvement	4,73

The described statistics showed the high evaluation of the specified categories and indicators, that are important for the work of accountants. While enlarging the offered framework Section 2 of the survey was offered. The data are

presented in Table 3, 4, and 5, following the described methodology of content units, categories and concepts. Total five open-ended questions were specified.

*Table 3 Content Units, Categories and Concepts -Q1 (made by Authors)*

Content Unit (specific, concrete)	Category (general)	Concept/Definition (scientific)
<b>Q1 - What additional knowledge do you need to acquire to improve your work in the field of accounting?</b>		
e-document management, digital transformation	Information and communication technologies (ICT), AI, Different Programs	<b>ICT</b>
Knowledge of IT technology, data security		
Benefits of AI, software, plugins and addins that help in daily work and be combined with existing software. Digital marketing, Adobe Illustrator, Canva apps to create visually appealing reports		
Mastering various computer programs		
Knowledge of Law	Knowledge of Law	<b>Law</b>
Application of legislation		
Law		
Following legislative changes	Knowledge of risk management	<b>Risk management</b>
Knowledge of Risk assessment		
Knowledge of Risk management	Recordkeeping	<b>Recordkeeping</b>
Appropriate recordkeeping		
Knowledge how to prepare of reports		

In accordance to Table 2 the basis of professional competence is founded on knowledge and understanding of primary tenets like standards, legislation and continuous professional development. While open-ended question offered additional insights for a deeper understanding of the multifaceted nature of professional competence among accountants (see Table 3). Besides general business management the risk management aspect should be considered, emphasizing the role of ICT.

The same principle applies across other categories as well. For skills, ICT is categorized under digital skills, repeatedly emphasizing its importance (see Table 4). While the inclusion of foreign language skills represents a novel addition to Section 1, as a fresh perspective on the spectrum of required competencies.

Table 4 Content Units, Categories and Concepts -Q2 (made by Authors)

Content Unit (specific, concrete)	Category (general)	Concept/Definition (scientific)
<b>Q2 - What other skills are important to be successful in accounting today?</b>		
Everything happens computerized, new reporting systems appear, therefore, besides basic knowledge of accounting, computer skills are very important	Digital skills in computerized environment (e-working)	<b>Digital skills</b>
Very important computer skills, programming		
The ability to adapt, including digital aspect		
Digital skills (e-working)		
Unambiguously digital skills, working with technology, a good intuition to be aware of the nuances of accounting in the company, to which to draw the attention of the parties involved on a daily basis, for example, when making transactions, to pay attention to special circumstances, executing correctly		
Time planning and monitoring, controlling the work of time (using programs Deskttime, Harvest, etc.).	Time planning/time management skills	<b>Time management</b>
Time management skill		
Concentration in work, timing		
Effective and successful communication	Effective communication skills	<b>Communication</b>
Skills to communicate with customers		
foreign language skills for project writing to attract additional funding to the organization	Foreign language skills	<b>Foreign languages</b>

Table 5 presents additional values and attitudes, enriching the comprehensive understanding of professional competence beyond conventional metrics.

The following additional indicators were listed based on general concept of professional competence of accountants: adding ICT, law, risk management and recordkeeping to Knowledge and Understanding; adding digital skills, time management, communication and foreign languages to Skills. While listing the same values and attitudes, emphasizing honesty and responsibility as well as attitude to professional development, changes and creativity.



*Table 5 Content Units, Categories and Concepts -Q2 (made by Authors)*

Content Unit (specific, concrete)	Category (general)	Concept/Definition (scientific)
<b>Q3 - What values are desirable to acquire in order to become a better accountant?</b>		
All of the above values are important in the work of an accountant	Same values as listed in Section 1, emphasizing honesty and responsibility	<b>Honesty Responsibility</b>
Professionalism, responsibility, cooperation		
Honesty and responsibility		
Must be honest and conscientious, almost scurrilous. The red signals cannot be ignored, either in the financial or related matters		
Honesty, confidentiality, responsibility		
All mentioned values in the first part		
Honesty, responsibility		
Attitude to improvement, quality communication and interpersonal attitudes	Quality in work and communication	<b>Quality</b>
Follow the basics and improve, follow the changes in legislation, understand the client's activities, good communication with the client and the SRS, a creative approach and positive attitude to work		
<b>Q4 - What attitudes do you think are the most essential to become a good accountant?</b>		
Interpersonal attitudes, attitudes towards technology, e- environment	Same attitudes as listed in Section 1, emphasizing attitudes towards professional development and changes, creativity	<b>Creativity Attitudes towards professional development Attitudes towards changes</b>
Attitude to professional development, constantly attend seminars, participate in refresher courses		
Attitude to professional development		
Motivation at personal, state and entrepreneurs' level		
Attitude to change, quick adaptation		
Quick adaptation		
Attitude to changes, creativity		
Creative approach is important		

The last open-ended question (Q5) was about accounting education. So, regarding the training offer for accounting studies, several aspects were mentioned to ensure the preparation of highly qualified specialists in the accounting field, these are:

- a lot of practice;
- to bring theoretical training closer to real working conditions;
- to involve practicing accountants in this process;
- to show more real-life examples while studying;

- to implement new/innovative approaches, including effective use of ICT;
- to adopt study programs to changing world and working conditions;
- to emphasize the need for digital skills, including programming and artificial intelligence.

## **Conclusions**

In conclusion, the present study has provided a comprehensive review of the criteria and indicators forming the framework of professional competence of accountants within practical consideration of experts. Section 1 of the survey presented statistical data on established metrics corresponding to knowledge and understanding, skills, values and attitudes. Building upon these foundational insights, Section 2 of the survey delved into additional indicators to each specified criterion highlighted by experts, expanding the scope of understanding beyond traditional measures, emphasizing the role of information and communication technologies and digital skills. The qualitative insights complemented the quantitative findings.

Furthermore, the aspect of training offer for accounting studies in Latvia perspective was covered in Q5. This nuanced perspective underscored the multifaceted nature of professional competence in the field of accounting, emphasizing the need of practice and bringing theoretical training closer to real working conditions.

By synthesizing both quantitative statistics and qualitative observations, this article offers a holistic perspective on the diverse dimensions of professional competence in updated trends, emphasizing the role of ICT, including AI and the importance of digital skills to stay abreast of the rapidly changing pattern in the accounting domain. In light of these findings, it is imperative for interested parties in the accounting field to consider the multidimensional approach to fostering professional competence among practitioners. This may involve the enlargement of traditional metrics by new or innovative approaches, reflecting the evolving landscape of the accounting profession.

While this article has provided valuable insights into the criterion and indicators of professional competence of accountants, it is essential to acknowledge certain limitations that may affect the interpretation and generalizability of the findings. Firstly, the number of origins used to form the theoretical background of the survey, where the corresponding frameworks were developed. Secondly, the size of study sample may have been limited, potentially affecting the representativeness of the results. Finally, the contextual factors of the study setting must be considered, as the findings may not be applicable in general context of professional competence, only accounting domain.

Despite these limitations, the study provides valuable insights into multifaceted nature of professional competence of accountants, navigating evolving landscapes of the field and highlighting the need for further research concerning the transformation of accounting training offer in response to global shifts.

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# TUTORING AS A MEANS OF INDIVIDUALIZING THE EDUCATIONAL PROCESS: AN EXPERIMENTAL STUDY

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**Abstract.** *The new information type of society has qualitatively changed the concept of training future specialists. Currently, technocratic relations in the "teacher-student" system are being replaced by humanistic ones, with a transition to cooperation with students as active subjects of the individualized educational process.*

*The authors of the article, taking into account the European experience of individualizing education, analyzed the peculiarities of using tutoring technology as a means of individualizing the education of master's students in the conditions of mixed education.*

*The results of the ascertaining stage of the pedagogical experiment, the participants of which were teachers and master's students of Dragomanov Ukrainian State University (Kyiv), National Technical University "Kharkiv Polytechnic Institute" (Kharkiv), Vinnytsia Mykhailo Kotsiubynskyi State Pedagogical University (Vinnytsia), are presented.*

*The purpose of the confirmatory experiment was to identify the level of understanding of university teachers, as well as master's students – future teachers of the essence of tutoring technology and the presence of experience in using it in professional activities.*

*The article proves that the use of tutoring technology in conditions of mixed learning allows students of higher education to gain experience in independent planning, obtaining and improving educational results. It is substantiated that the acquisition of such experience takes place during the work of tutors (with systematic tutoring support) on individual tutorials, which contain multi-level complex tasks from a certain educational subject. The role and place of the scientific essay as a component of tutoring technology and as a means of individualizing the educational process, which ensures the development of independent creative thinking of students, the formation of their ability to structure information, skillful presentation of*

*arguments, establish cause-and-effect relationships, and formulate conclusions, is characterized.*

**Keywords:** *educational process in a higher education institution; individualization; master's students; tutoring support; tutoring technology; university teachers.*

## **Introduction**

The changes in Ukrainian society of the recent decades have affected the life and professional orientation of young people. The increasing role of the subjective factor in society, the complication of living and working conditions, the change in economic formation, and the development of personality prove that the system of higher education requires modification, going beyond traditional teaching methods and moving to an individualized student-centered paradigm. Tutoring technology is capable of ensuring such a transition, which allows creating a variable educational method with the possibility of flexible use of the main methodological techniques of individualized training. The individualization of the educational process stimulates the student's cognitive activity and leads to a transition of the teacher's role from a traditionally controlling one to a managerial one. The function of tutor support is the formation of student's attitudes and ideas about their personal role as a subject of educational activity; definition of the information environment and the development of students' cognitive and communicative skills in mastering information. Such reorganization is aimed at improvement of the quality of education, ensuring its "transparency", creation of a special environment of intersubjective cooperation between the tutor and the student.

The purpose of the article is to define the existing readiness levels of higher education institution teachers to implement individualized educational process by tutoring means.

## **Literature review**

Tutoring, as one of the institutionalized forms of mentoring, originated in the first British universities – Oxford (XII century) and Cambridge (XIII century). "Tutor" (translated from English) is a teacher-mentor, teacher-consultant, home teacher, private tutor, school mentor. In English universities, tutoring activity is a qualitative characteristic of pedagogical activities related to the organization of mentoring activities. For example, the tutorial system is a university education system assigning students to individual consultants for the period of study at an educational institution.

At the moment, having more than 25 years of experience working in higher education institutions in Ukraine, we can claim that the use of tutoring technology is quite limited. Thus, authors mostly consider a tutor as a home teacher in a

secondary school (Sriprakash, Proctor & Hu, 2016; Yung & Yuan, 2020). N. Demyanenko defines the conceptual aspects of the tutoring technology introduction as one of the progressive ones in terms of the integration of higher education of Ukraine into the pan-European educational space (Demyanenko, 2020).

The relevance of the appearance of the term "tutor" in scientific terminology and the emergence of the corresponding profession in the education system of Ukraine, the functional duties of tutors are defined by T. Derba (2011).

In the scientific field of the problem under investigation there are works that update the role of the tutor in the university and consider the structure of university tutoring (personal-social, academic and professional components) (López-Gómez, Leví-Orta, Medina Rivilla & Ramos-Méndez, 2020). They emphasize the need to train tutors for the implementation of professional activities in the conditions of the information society and the need to form their ICT competence (Sysoieva, Osadcha, 2020). The same is emphasized by S. Bennett & D. Marsh (Bennett, Marsh, 2002). In the context of the interaction between formal and informal education, A. Gupta, 2022 considers the possibilities of tutoring, emphasizing the ability of tutoring to meet the various educational needs of students (Gupta, 2022).

The term "individualization" in close connection with such similar definitions as "personalization" and "differentiation" is studied in the work of K. Lokareva & E. Bazhmina in psychological and pedagogical contexts (Lokareva & Bazhmina, 2021).

Personalization as a necessary component of the European educational space, which replaces excessive administration and disciplinary restrictions and contributes to the formation of an independent, motivated personality of the student, is considered by M. Simons (2021).

The authors defined the leading role of the student in the educational process, provided they are motivated to study, which determines their ability and desire to work independently, planning an individual path, place, time and pace of activity (Lokareva & Bazhmina, 2021).

Features of the implementation of individual online training, the role of tutors in this process are considered in the work of L. Zhang (Zhang, Pan, Yu, Chen & Zhang, 2023).

### **Research methodology**

The following methods were used in the research: theoretical (analysis; generalization of literary sources in order to determine the theoretical aspects of the outlined research problem) and empirical (survey of university teachers and master's students on whether they have experience using tutoring technology for the purpose of individualizing the educational process), as well as pedagogical

observation of classes in higher education institutions for implementing the idea of individualized learning.

### **Organization and results**

The research was conducted in the period from September to December 2023. The survey looked at teachers of the following institutions of higher education: 22 representatives of Dragomanov Ukrainian State University (Kyiv, Ukraine) in the number of; 16 representatives of National Technical University "Kharkiv Polytechnic Institute" (Kharkiv, Ukraine); 20 representatives of Vinnytsia Mykhailo Kotsiubynskyi State Pedagogical University (Vinnytsia, Ukraine).

The purpose of this survey was to find out the current level of readiness of teachers to individualize the educational process by means of tutoring. For this purpose, appropriate criteria were developed and their indicators determined: motivational (need for professional and personal growth; desire for innovations in professional activity); cognitive -operational (knowledge of the essence of the individualization process and tutoring technology, their ways and means in the educational process); reflective (the need for introspection and the formation of self-assessment skills of one's own professional activity).

Three levels of teachers' readiness to individualize the educational process are also characterized. High – expressed motivation for continuous self-development and improvement with readiness to implement advanced pedagogical approaches; deep understanding of the theoretical basis and application of practical experience of tutoring in professional activity; systematic self-analysis and active self-assessment of strengths and weaknesses. Sufficient – growing awareness of the importance of professional and personal development; in-depth understanding of the range of methods and technologies of an individualized approach and the ability to apply tutoring in practical situations; active self-assessment and identification of gaps for self-improvement. Low – insufficient understanding of the importance of individualization in the educational process; basic understanding of theoretical aspects of tutoring as a technology of individualization; limited readiness for own critical assessment of professional activity.

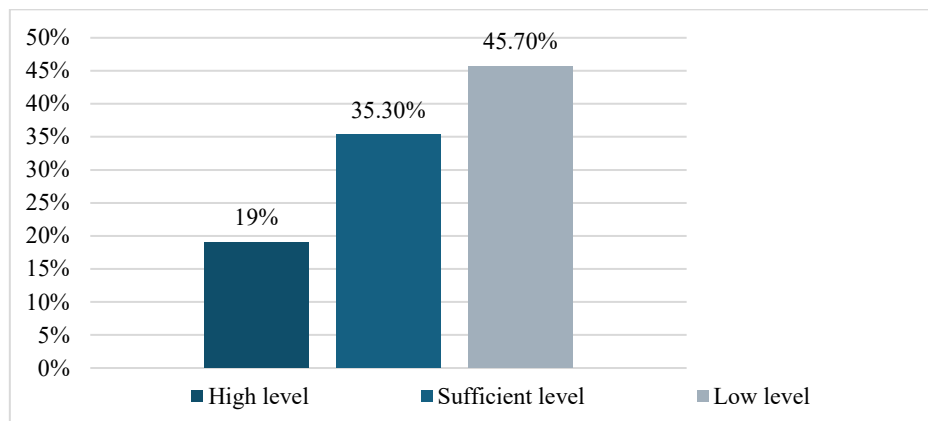
Respondents were offered to fill in Google Forms, which included three blocks of questions, according to selected criteria. The answers to the questions of the motivation block were ranked according to the scale: yes (high level), partially (sufficient level), no (low level).

To the first question "Do you need professional growth?" 31% of respondents answered "yes", 35% answered "partly", 34% answered "no". To the question "Do you strive to master tutoring technology as an innovative



educational technology?" 28% of respondents answered "yes", "partially" – 45% of respondents, "no" – 27%.

Answers to the question "Do you consider it necessary to individualize the educational process?" were as follows: "yes" – 58% of respondents, "partially" – 26%, "no" – 16%.



*Figure 1 Level of readiness for individualized education by motivational criterion (made by authors)*

The received results proved the insufficient level (45.70%) of teachers' motivation for professional self-improvement and mastering innovative technologies for organizing the educational process, and tutoring in particular.

The cognitive-operational block included 3 questions, each of them provided 3 options corresponding to high (1-A, 2-B, 3-B), sufficient (1-B, 2-B, 3-B) and low (1-B, 2-A, 3-A) levels of readiness of teachers to individualize the educational process by means of tutoring.

The following answers were offered to the first question "Choose the most complete interpretation of the process of individualization of educational process": A – differentiation of educational material, development of a system of tasks with various complexity and scope, provision of individual support for the learning process; B – adaptation and modification of the standard curriculum, careful and systematic structuring of specified educational tasks B – selection of means, methods and pace of learning given the individual differences of the subjects of learning.

The respondents' answers were as follows: option A was chosen by 21% of respondents, option B by 29%, option B by 50%. This distribution indicates a somewhat limited understanding of the essence of individualization by teachers.

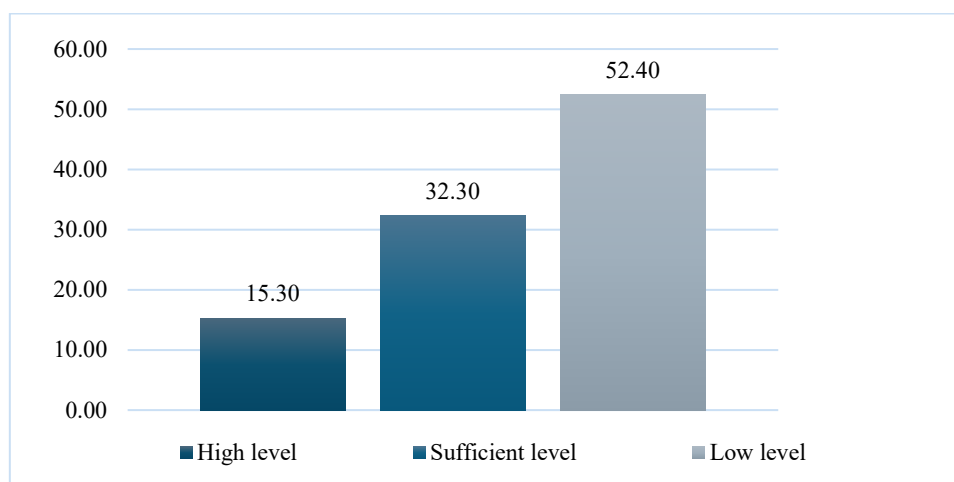
The second question by the cognitive-operational criterion required the respondents to define the main tasks of the tutor. The answer options were as follows: A – identifying the area of educational interests and educational difficulties of the tutor; personality diagnosis and consideration of its role in achieving personal success; B – identification of the area of educational interests

and educational difficulties of the tutor, planning, projecting of the tutor's actions, assistance in overcoming problematic moments in education and issues of personal and professional development; discussion of alternative scenarios of educational activity; B – all of the above. The answers of the respondents were as follows: A – 52%, B – 21%, C – 27%.

Therefore, the results show that the vast majority of respondents do not sufficiently operate with concepts of tutoring technology, do not sufficiently distinguish the content of the tutor's tasks as an executor of tutoring support in a practical dimension.

The next question of the block "Individual educational trajectory, in your opinion is..." provided the following answer options: A is a personal path of development of abilities, personal qualities and mental processes of the subject of study; B – implemented through the free choice of the educational program, educational disciplines and their level of complexity, methods and means of education; B – is formed by students determining their own educational goals, as well as choosing: forms of education; educational subjects (integrated courses); forms of organization of the educational process, methods, teaching aids.

Option A, which corresponded to a low level of readiness for individualized education, was chosen by 46% of respondents. Option B, which corresponded to a sufficient level, was chosen by 26%. Option B, which corresponded to a high level, was chosen by 28% of respondents (Figure 2).



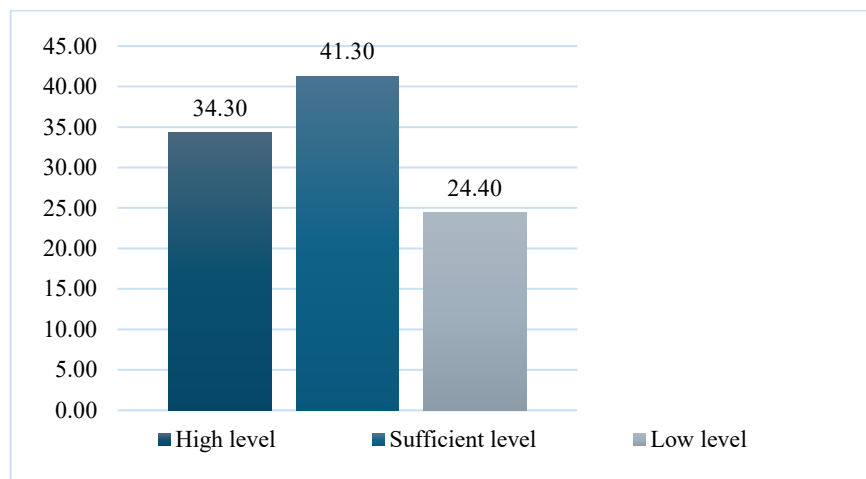
*Figure 2 Level of readiness for individualized education by cognitive-operational criterion (made by authors)*

So, the results confirm that the vast majority of respondents (52.40%) have a low level according to the cognitive-operational criterion, determined by a low level of knowledge about the essence of the process of individualization, tutoring technology, insufficient operation of the ways and methods of their use in the educational process.

Let's analyze the answers to the questions by the reflexive criterion. The first question is "Do you consider reflection a necessary component of a teacher's professional activity?" 47% of the respondents answered "yes" (we correlated this answer with a high level of studied readiness), 28% – partially (medium level), 25% – "no" (low level).

To the question "Do you agree with the statement that reflection provides a teacher's assessment of the results of professional activity?" the following options were provided: A (low level) – I agree; B (sufficient level) – I partially agree, since reflection also involves the analysis of mistakes made and success achieved; B (high level) – I partially agree, because reflection also enables the individual to actualize the processes of self-organization, mobilizing his own intellectual potential, find out the reasons of mistakes and correct them. The respondents' answers were as follows: option B was chosen by 25% of respondents; option B – 46%, option A – 29%.

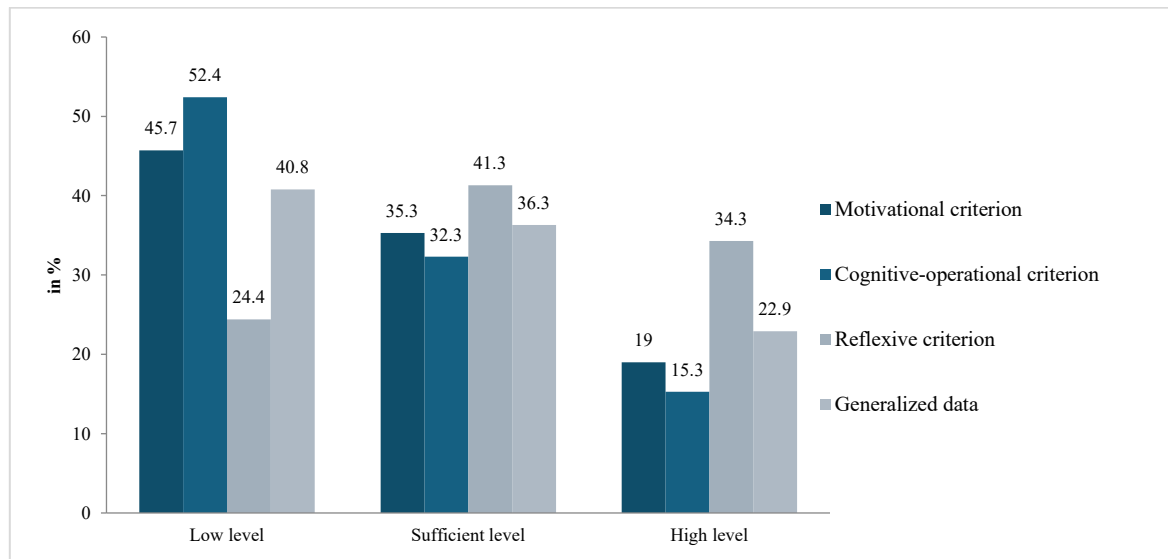
To the question "What is the importance of reflection for the development of personal qualities, acquisition of knowledge, development of new types of activities?" the following answers were offered: A (high level) – it provides an analysis of the individual's activities for the purpose of deep self-knowledge and self-development; B (adequate) – it provides the ability to understand oneself; B (low level) – is unimportant. The respondents' answers were as follows: 31% of respondents chose option A, 50% – option B, 19% – option B.



*Figure 3 Level of readiness for individualized education by reflexive criterion (made by authors)*

Therefore, the analysis of the answers by the reflexive criterion proves that the vast majority (41.3%) is at a sufficient level, which is characterized by a systematic need for self-analysis and formed ability to self-assess their own professional activity.

The generalized results of the experiment are presented in *Figure 4*.



*Figure 4 Generalized results of the level of readiness for individualized education (made by authors)*

So, according to the results of the experiment, we see that the vast majority of respondents, 40.8%, have a low level of readiness for individualized education. They understand and realize its importance, but are not ready for the systematic application of the full range of methods and technologies of individualization, in particular, tutoring technologies in specific practical situations.

Let's analyze a few more open questions provided by the survey.

Respondents were asked to give an open answer to the question "Provide arguments for the use of individualized education in the modern educational space." Respondents' answers varied: "such training provides an opportunity for personal development in a chosen field and develops leadership qualities"; "because every student is an individual, with their own needs and problems"; "the formation of personality at all levels of life depends on it." There were answers that indicated a much deeper understanding of the essence of the outlined question by the teachers. For example: "creating a flexible personality of a specialist ready for the conditions of a rapidly changing world"; "diversity of educational needs and opportunities of students".

The survey provided one more open question: "What knowledge is required for a teacher to provide tutor support?". By required knowledge, the respondents mainly understand "knowledge of pedagogy and psychology" (62.3% of the total number); "features of using information and communication technologies" (34.1% of the total); "knowledge of methods of differentiation and personalization of training" (38.9% of the total number).

Therefore, it can be stated that the respondents have rather general understanding of tutoring technology as a means of individualized education.

The observation of the professional and pedagogical activity of the respondent teachers was carried out offline and online within the framework of the educational process (lectures, seminars and practical sessions). The results showed the lack of implementation of tutoring technology for the purpose of individualization in the educational process of the respondents, since they consider the differentiation of tasks to be the main means of individualization.

Thus, the conducted additional surveys and observations confirmed the results of the ascertainment stage of the research and testified that the majority of respondents do not have a complete understanding of the essence of tutoring technology and its role in ensuring the individualized education. Accordingly, they have a low level of readiness for the individualization of the educational process by means of tutoring.

Therefore, it is necessary to develop an experimental program for future teachers (master`s degree students of the specialty 011 "Educational Pedagogical Sciences" of 4 universities who acquire the qualification of "teacher of a higher education institution") to improve their readiness for the individualization of the educational process by means of tutoring.

The program of the experiment, prepared for implementation, includes the introduction of additional content of the disciplines of the general and professional blocks, which will allow to form the knowledge necessary for the implementation of the tutoring technology.

The leading means of implementing tutoring technology in our research are individual tutorials, including sets of tasks of different levels, prepared according to the program of a certain educational component and designed for individual performance by students, followed by individual (collective, if necessary) discussion (consultation) with a teacher-tutor.

For example, an individual tutorial from the course "Psychological and Pedagogical Technologies", which is taught to master's degree students of Mykhailo Drahomanov State University, may include the following tasks:

1. Tasks of a reproductive nature. Define the concepts: "global educational trend", "innovative pedagogy", "educational innovations", "criteria for evaluating the effectiveness of the introduction of pedagogical innovations into the practice of the educational institution".
2. Problem-search task. Reveal the content of coaching technology (features, methodical advice, advantages, disadvantages). Prove or disprove the fact that this technology is innovative.
3. Scientific and practical development. Briefly describe the author's educational technology (innovation, retro-innovation). Description scheme: author(s) of the technology, content (theoretical rationale, implementation features), references to the literature.
4. Prepare an annotated description of 3 literary sources on the problems of theoretical justification and practice of introducing innovative

psychological and pedagogical technologies into the activities of educational institutions.

Preparing a discussion of issues, the tutor helps to deal with the most difficult of them, to determine the personal significance of the material, the scope of its practical application. The discussion can take place both individually and in small groups, after which the student must consider the logic of the next steps of their individual progress along the set educational route (the specific subject and the content of professional training as a whole are taken into account). Expanding the existing educational space of each student is one of the most important tasks of a tutor.

In addition to working on individual tutorials, tutoring technology involves such work as writing scientific essays (following the example of UK universities). Its purpose is to develop students' skills of logical thinking together with their writing skills, to express their ideas with a certain structure, unity and sequence of presentation (specific examples, comparisons/contrasts, explanations of cause and effect relationships, arguments (convictions), evidence, arguments, etc.).

## **Conclusions**

Tutoring technology is aimed at the individualization of the educational process through the actualization of the need for self-determination, self-education, a meaningful attitude of a person to their own life, their future, prospects, the need for lifelong learning. This is directly related to the tasks of humanization of education, with the goal of modern education to teach a person to use their resources, their potential in accordance with their goals and development prospects (both personal and professional).

Therefore, we consider tutoring support for the educational and professional self-realization of a future specialist in the educational environment of higher education institutions to be a system-forming factor of their professional training. It guarantees the affirmation of the subject position of students in the conditions of such interaction of subjects, which ensure a mutually enriching transformation of behavior, consciousness, motivational, intellectual and activity-based spheres of the personality.

In view of the fact that tutor support is implemented in subject area (consulting within the academic subject); social area (aspects of the immediate development zone); anthropological area (understanding oneself, one's capabilities), the question of the possibility and/or expediency of mastering all the necessary competencies by a teacher of a higher education institution remains debatable. In our opinion, the issue of mastering the tutoring competence, which content is also currently in the stage of active substantiation, requires a solution.

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# EXPLORING THE CONTENT AND STRUCTURE OF FUTURE PRIMARY SCHOOL TEACHERS' EMOTIONAL INTELLIGENCE

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**Abstract.** *The aim of the present study is the theoretical justification and empirical research of the emotional intelligence level of students speciality "Primary Education", the disclosure of pedagogical conditions for the development of emotional intelligence of future primary school teachers in the process of their professional training in a higher education institution.*

*The theoretical and experimental research was conducted during 2021-2023 on the basis of the Faculty of Psychology and Pedagogy of the Mariupol State University. It performed two main tasks: 1) determination of the emotional intelligence development level of future primary school teachers, in particular in the context of their professional training; 2) justification of effective pedagogical conditions for the development of emotional intelligence in future primary school teachers.*

*The article describes the biological, social and pedagogical factors of the development of emotional intelligence. The principles of organizing the process of developing emotional intelligence in a higher education institution are considered: the principle of activity, contextuality, systematicity, and the principle of emotional variability. The analysis of empirical data obtained within the framework of the conducted research is given.*

**Keywords:** *emotional awareness, emotional intelligence, empathy, future primary school teacher, managing social relationships, New Ukrainian school, primary school, professional training, personal motivation, self-motivation.*

## Introduction

Social and emotional education (SEE) has attracted substantial attention from researchers, educators, and curriculum developers all over the world for nearly three decades now. The goal of SEE is to help children develop



self-confidence and self-control skills, increase social awareness, and improve the quality of their relationships.

Social and emotional education is also connected with positive academic attitudes, increase academic achievement, prosocial behaviour and decrease antisocial behaviour and anxiety. It also affects the formation of positive relationships, a sense of belonging to the team, and a tolerant attitude towards an individual.

The content of the State standard of primary education determines guidelines of the primary school students' harmonious development and defines a list of cross-cutting skills, namely: problem-solving, critical and creative thinking, the capacity to cooperate, communicate effectively, the capacity to develop one's own emotional intelligence, conduct research, organize own activity, ability to reflect, thoughtful reading, etc (Kabinet ministriv Ukraini, 2018).

In view of the above, the development of emotional intelligence of younger schoolchildren is considered as one of the priority tasks of modern education. Solving this issue is impossible outside the context of the teachers' pedagogical activity, the level of emotional intelligence, readiness to develop the emotional intelligence of younger schoolchildren. Therefore, emotional and ethical competence (B2) occupies an important place in the Professional Standard for the profession "Primary school teacher of general secondary education". The specified competence includes a complex of other, narrower competences, namely:

- the capacity to be aware of personal sensations, emotions and feelings, needs, to manage one's own emotional states (B2.1);
- the ability to constructively and safely interact with the participants of the educational process (B2.2);
- the ability to realise and appreciate the interdependence of people and systems in the global world (B2.3) (Verkhovna Rada of Ukraine, 2020).

The results of current scientific research and the practice of educational institutions regarding the development of the emotional intelligence of schoolchildren show that the development of the emotional intelligence of primary school teachers' personality is one of the key prerequisites for their successful professional activity.

In view of the above, the problem of developing higher education students' emotional intelligence becomes relevant.

*The research aim* is to theoretically substantiate and empirically investigate the level of emotional intelligence development of the "Primary Education" specialty students.

## **Literature review**

Nowadays, emotional intelligence is attracting more and more attention from researchers. Wide interest in this problem is not accidental: developed emotional intelligence enables a person to positively influence his own adaptation in society and achieve the tasks in life, which is an urgent problem today. There is even a belief among researchers, supported by the results of numerous studies, that it is emotional intelligence that determines 80% of a person's future success in various areas of his life (social, professional and personal). IQ in this context stands out at no more than 20%.

However, the concept of emotional intelligence (EI) has been used in scientific researches relatively recently. The theory of EI and the concept of emotional competence as a key condition for personal success have been used since 1990 thanks to the works of J. D. Mayer and P. Salovey, who first substantiated this phenomenon. Since then, numerous studies have been conducted with the purpose of conceptualising this topic, developing indicators of EI and criteria for its formation (Mayer, DiPaolo, & Salovey, 1990).

The influence of developed EI on various spheres of everyday human life was studied by J. D. Mayer and P. Salovey proved the correlation between a high level of EI and an increased likelihood of good health and appearance, positive interaction with friends, loved ones, and family. The structure of EI was studied by P. Salovey, factors affecting emotional intelligence were studied by O. Veritova. We emphasise that these studies contributed to the creation of methods aimed at ensuring emotional communication within educational activities (Mayer et al., 1990; Veritova, 2019).

V. Zarytska considered the problem of developing the EI of students in the professional training system (Zarytska, 2013). Emotional intelligence was studied as one of the factors of social and psychological adaptation of the individual to the student environment and as a mechanism impacting the life success of the individual (Nosenko, & Chetveryk-Burchak, 2014).

## **Theoretical Consideration**

Characterization of pedagogical conditions and factors for the development of emotional intelligence of future primary school teachers in the process of professional training requires clarification of the concept of “emotional intelligence” and its structural elements. It should be noted that researchers do not have a single vision regarding the interpretation of this concept, but there are different approaches to defining the concept of “emotional intelligence”, which characterizes it as quite complex. P. Salovey i J. D. Mayer provide the following understanding of the concept of emotional intelligence as “the capacity to monitor one's own and others' feelings and emotions, distinguish between them, and use

this information to guide one's thoughts and actions” (Mayer et al., 1990). The understanding of the mentioned scientists about the nature of emotional intelligence is targeted at understanding the structure of emotions. The EI model proposed by the researchers has a number of elements that emphasise the capacity to recognize and analyse emotions: identify them, cause and handle emotions, understand and analyse them, regulate their influence (Zadorozhna-Knyagnitska, & Hadzhinova, 2021).

D. Goleman's structure of emotional intelligence is characterised by a number of cognitive characteristics that combines with individual traits. The researcher singled out important personal characteristics that are evidence of developed EI: the capacity to form suitable types of relationships with other people; the capacity to sensitively respond to other people's emotions; the capacity to use empathy.

According to D. Goleman's model, educational programs for the development of EI should focus on certain results: understanding one's own emotions; the capacity to control one's emotions; empathy; management of social relations (Goleman, 2011; Zadorozhna-Knyagnitska, & Hadzhinova, 2021).

Purposeful development of emotional intelligence is possible. In particular, D. Mayer, P. Salovey believe that emotional knowledge – the type of knowledge that EI works on – can be relatively easily acquired, including in the process of learning (Mayer et al., 1990); according to D. Goleman and other researchers of emotional intelligence, it can and should be developed (Goleman, 2011). In their opinion, emotional intelligence can be consciously formed in children in the process of education and upbringing, and in adults – through education.

To understand the algorithm for the development of EI, it is necessary to consider the factors that affect this process.

We can single out three groups of factors for the development and formation of emotional intelligence: biological, genetically determined (functional asymmetry of the brain, temperament properties and cognitive abilities), social (conditions of family socialization, personal attitudes, the individual's own activity and his religiosity) and pedagogical.

Characterising biological conditions, D. Goleman notes that the dominance of the right hemisphere of the brain is one of the main biological factors in the development of emotional intelligence. The right hemisphere is responsible for creative thinking, integrity of perception and imagination. The dominance of the right hemisphere is associated with non-verbal intelligence, which contributes to the accuracy of emotional hearing – the recognition of emotions in speech. Therefore, people with a dominant right hemisphere better recognize emotions and adequately respond to the emotions of others (Goleman, 2011).

Social factors also have an important role in the development of emotional intelligence. Emotionally rich relationships between parents are necessary to create optimal conditions for the child's emotional development. In such families,

more time and attention are devoted to discussing and analysing each other's emotional issues and emotional experiences. The tendency of parents to analyse emotional problems contributes to a better understanding of the child's own emotions and the development of emotional self-regulation.

Pedagogical factors in the formation of EI include: emotional communication in the educational environment; emotionality of the teacher; partnership relationships (interaction and cooperation of students, teachers, parents); the role of pair and group forms of work; atmosphere of emotional comfort; activities aimed at obtaining essential experiences that bring joy and negative emotions; active forms of educational activity that cause emotions (games, quizzes, contests, trainings, etc.); the emotionality of the educational material; clarity, on the basis of which feelings and emotions arise, evokes vivid images; multimedia tools; a set of exercises and tasks that help identify, understand and control one's own emotions and the emotions of others (Suxopara, 2019).

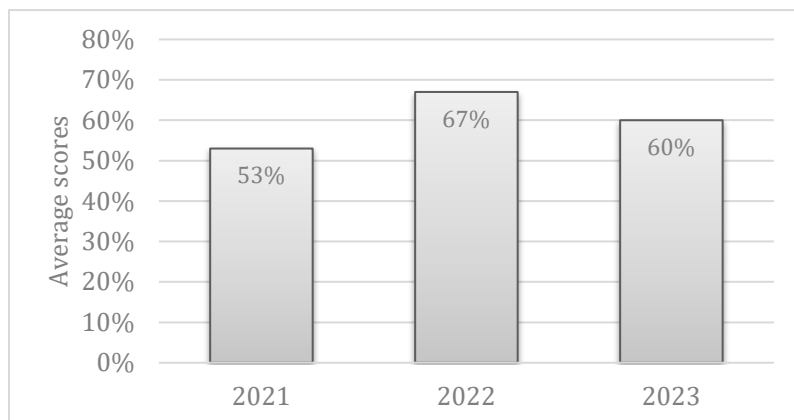
## **Methodology**

In order to determine the level of development of future primary school teachers' emotional intelligence in the process of their professional training and development of the necessary methodological materials, an empirical study was conducted among students of higher education in the speciality 013 Primary Education of full-time and part-time forms studying at Mariupol State University in the period from 2021 to 2023. The sample consisted of 90 undergraduate students. The average age of the study participants is 19 years. The "Emotional intelligence test" by N. Hall was used, aimed at determining the level of emotional intelligence according to personal characteristics. This technique consists of 5 scales and 30 statements. These scales are: emotional awareness scale; managing one's emotions scale (emotional forgiveness, emotional non-rigidity); self-motivation scale (the ability to independently manage your emotional state); empathy scale; recognition of other people's emotions scale (the ability to influence the emotional state of others).

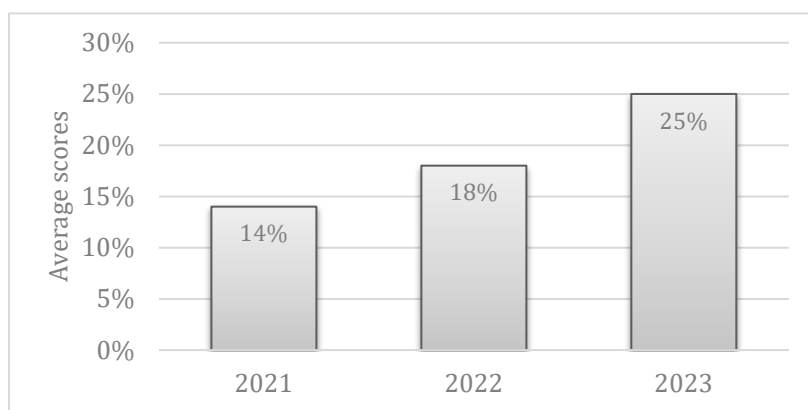
Each statement requires a response on a 6-point scale: from -3 (strongly disagree) to +3 (strongly agree). According to the results, three levels of each scale can be distinguished: high level (14 and above points), medium level (13-8 points), low level (7 and below points) (Doroshkevych, & Ilyash, 2020).

## **Research results**

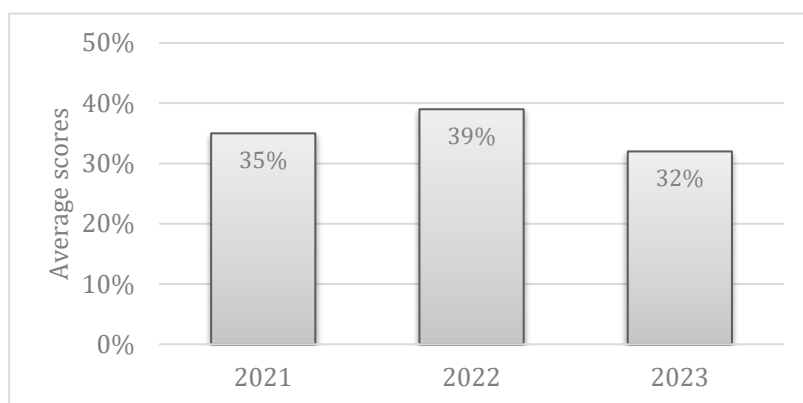
After conducting the test, we received the following results based on levels of emotional intelligence of future primary school teachers (Fig.1; Fig.2; Fig.3; Fig.4; Fig.5).



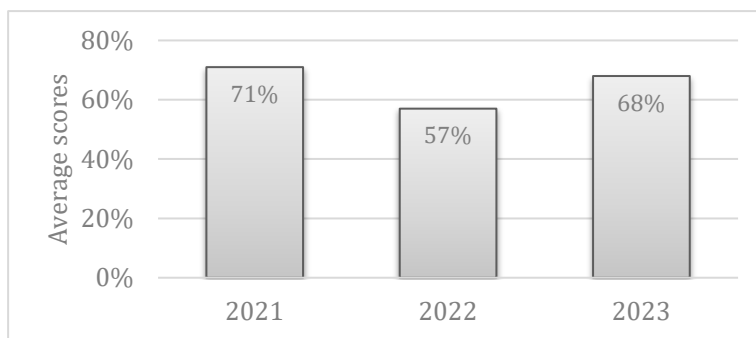
**Figure1** *The level of emotional intelligence according to the N. Hall test (scale of emotional awareness) (made by authors)*



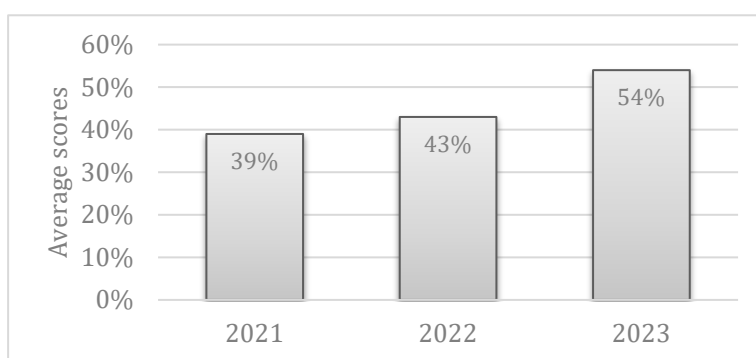
**Figure2** *The level of emotional intelligence according to the N. Hall test (scale of managing one's emotions) (made by authors)*



**Figure 3** *The level of emotional intelligence according to the N. Hall test (scale of self-motivation) (made by authors)*

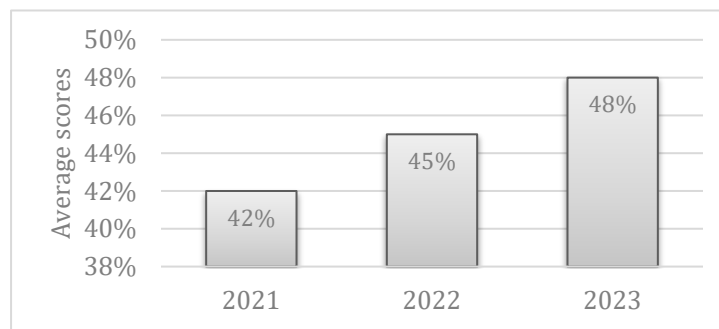


**Figure 4** *The level of emotional intelligence according to the N. Hall test (scale of empathy) (made by authors)*



**Figure 5** *The level of emotional intelligence according to the N. Hall test (scale of recognizing emotions of other people) (made by authors)*

According to the research results, the level of development of students' EI is low (Fig.6). In N. Hall's methodology, it is determined that the sum of all scales is equal to the level of emotional intelligence of an individual. A high level is characterized by 70 or more points, an average level is 40-69 points, a low level is equal to 39 points and below. Regarding individual scales, the levels of empathy (9,16) and emotional awareness (8,5) are somewhat higher, but they are also approaching the lower limit of the average level. Particularly alarming is the very low indicator of “managing one's emotions” (2,6), which indicates significant difficulties for students in freely managing their own emotions. Therefore, the obtained results demonstrate that most students do not know how to manage their emotions and direct them into a constructive matter, are not emotionally flexible, have a poor idea of what the people around them feel and how to interact with all this.



*Figure 6 Comparison of levels of cumulative emotional quotient during 2021-2023 (made by authors)*

Based on researched scales of EI, it is worth noting that that its development occurs through the formation of relevant competencies, in particular:

- 1) identification, verbal and non-verbal perception of own emotions;
- 2) detection of other people's emotions (empathy);
- 3) regulation of own emotions and emotions of other people;
- 4) the use of emotions in thinking and activity (creative thinking, attention switching and motivation, flexible planning).

For the effective development of emotional intelligence, researcher O. Veritova formulated special teaching principles aimed at developing the emotional intelligence of students of higher education. They include:

1. The principle of activity, which involves the formation of emotional competence of students through repeated performance of various emotionally coloured types of educational activities.
2. The principle of contextuality, which involves filling the professional training of future primary school teachers with various types of contextual activities: academic-type learning (educational activities with the leading role of lectures and seminars), quasi-professional activities (business game, special courses), actual professional activities (vocational practice, diploma and course design).
3. The principle of systematicity, which focuses on the formation of a systematic idea among students about future professional activity, about the role and place of emotional competence in this activity.
4. The principle of emotional variability, which involves the formation of future primary school teachers' abilities to make adequate decisions in choice situations, their preparation to overcome stressful pedagogical barriers, formation of the ability to choose the optimal option (Veritova, 2019).

Thus, taking into account the complex of the above-mentioned principles of the organisation of the educational process will fully ensure the development of the emotional intelligence of future primary school teachers.

Student age is characterised by significant variability of emotional reactions and ways of expressing emotional states. Experiencing certain emotions affects the personal and professional development of students. Understanding emotional states and adequate response to specific social factors is an important condition for effective educational and professional activity. That is why one of the pedagogical conditions for the development of EI is students' understanding of the essence of the notion of emotional intelligence and its importance in educational and professional activities. Fulfilment of the specified condition involves the formation of future teachers' knowledge about emotional intelligence as a personality trait that impacts the perception of oneself and others, communication skills, personal life and professional activity, helps to overcome problems and stressful situations. To ensure this condition, it is proposed to introduce the discipline "Emotional intelligence in education" (3 ECTS credits) into the educational program "Primary Education". The purpose of the course is to provide future primary school teachers with the knowledge, skills and abilities to use emotional intelligence and develop it in schoolchildren.

The tasks of the course are to give students an idea about the nature of "emotional intelligence" and its relationship to the professional environment; to make them aware of the internal and external components of "emotional intelligence" and the features of its perception as a dynamic system; to form students' ideas about the role of "emotional intelligence" as a decisive factor in the success of individual self-realization; acquiring skills to develop emotional intelligence. The modules of the discipline are focused on obtaining not only theoretical knowledge, but also practice-oriented information (Khadzhynova, 2022).

An important condition for the development of EI of future primary school teachers is the creation of a favourable educational environment in institutions of higher education. After all, a favourable psychological climate, an atmosphere of creativity, cooperation, support and partnership is the key to the effective development of EI. Emotionality in communication with classmates and professors creates openness in experiences and feelings. At the same time, the professor acts as a facilitator, combining the characteristics of a manager, leader and participant in the process of learning. The development of emotional intelligence is facilitated by the acceptance and understanding of the individuality of each student, which is facilitated by trust and respect, daily help and support, openness and constant readiness to help (Khadzhynova, 2024).

According to M. Shpak, the development of emotional intelligence of future primary school teachers can take place in various types of activities, especially in the process of organised education. Therefore, another condition for the development of students' emotional intelligence is the inclusion of active forms, methods and means of developing emotional intelligence in the educational process of a higher education institution. In addition, the development of



emotional intelligence of future primary school teachers is facilitated by their participation in various extracurricular activities, such as social projects and actions (Shpak, 2021).

### Conclusions and discussion

So, the problem of developing emotional intelligence arouses the interest of researchers from various fields of scientific knowledge. That is why there are many approaches to defining the concept of “emotional intelligence”, its structure, as well as understanding the possibility of developing emotional intelligence in the process of learning at different age periods of an individual's life.

In our study, the factors of the EI development were characterised, which include biological, social and pedagogical factors. The principles of organising the process of developing emotional intelligence in a higher education institution are considered. They are principle of activity, the principle of contextuality, the principle of systematicity, and the principle of emotional variability.

It was determined that the level of emotional intelligence of Primary Education students is quite low and ranges from 42% to 48% on average. For the development of students' emotional intelligence, it is necessary to provide them with theoretical knowledge about emotional intelligence as a personality trait that affects the perception of oneself and others, communication skills, personal life and professional activity, helps to overcome problems and stressful situations. The next condition is the creation of favourable conditions in a higher education institution. A friendly psychological atmosphere, a student-centered approach, active learning and the use of emotions in the learning process, participation in extracurricular activities, emotional communication with classmates and teachers will ensure the formation of the necessary abilities for the development of emotional intelligence of future primary school teachers.

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## PEDAGOGICAL SKILL OF A HIGH SCHOOL TEACHER

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**Abstract.** *The scientific and pedagogical activity of a high school teacher is multifaceted, it covers purely teaching activities, scientific research, scientific and methodological work, educational and organizational influence on student youth, self-education. In each of the areas of activity, either the nominal attitude of the teacher to it, or his desire to carry out work at a high level, is manifested. These high requirements for one's own activities, critical thinking, creativity distinguish a teacher with a high level of pedagogical Skill. The relevance of this topic is due to the need to improve pedagogical skills as a component of pedagogical activity, a high degree, perfection and criticality in the activities of a higher school teacher, to determine the skill of a higher school teacher in professional activities, the ability to evaluate and accordingly use knowledge and skills in modern pedagogical situations. The purpose of the study is to reveal the influence of higher education on the formation of pedagogical skills of a teacher. Higher education at the present stage of development of society is called upon to give priority to the formation of students' pedagogical skills as a complex of properties of the teacher's personality, which ensures a high level of self-organization of pedagogical activity; to acquaint with the mechanisms of creative self-realization in professional activity; organize professional and pedagogical activities as a developmental and educational interaction; acquaint with modern pedagogical experience by creating a teacher's portfolio. The methodological basis of the study is the theoretical statements and conclusions of the achievements of the world pedagogical thought, modern concepts and laws of the education system in higher education institutions.*

**Keywords:** *higher education institutions, pedagogical skills, pedagogical technique, professional and pedagogical activity, teacher.*

### Introduction

**Relevance.** The article discusses the issues of formation of pedagogical skills of a higher school teacher as an important factor in the development of educational institutions and ensuring the quality of educational services. The analysis of scientific, scientific-pedagogical literature, research shows that the problem of forming the skills of a higher school teacher is urgent. Pedagogical skills are one of the most important components of the training of a modern high school teacher. It is the professional and pedagogical culture the teacher

determines the degree of development of his ability to solve professional problems and characterizes him as a master of his craft.

**Statement of the problem.** The pedagogical skills of a higher school teacher are an important factor in the image of a modern higher education institution. The formation of a highly moral, comprehensively developed, harmonious personality of a teacher involves active interaction of teachers of a higher education institution with students. The purpose of higher education today is to train specialists who are able to ensure the transition from an industrial to an information and technological society, through innovations in the educational process and scientific and methodological work. Therefore, the main task of a modern higher education institution in Ukraine should be the formation of an innovative educational environment, which involves not only changes in the organization of education, but also the improvement of teachers' professional skills. In order for higher education in Ukraine to meet the requirements of the time as much as possible, such factors as competence, professionalism, intelligence, creativity should play a leading role in the functioning of this sphere. All these features can be considered necessary features of a modern creative teacher of a higher education institution, who is constantly faced with the problem of improving, increasing his pedagogical skills.

**The aim** of the article is to define the essence of the concept of «pedagogical skill», to allocate the components of the teacher's skill, ways to increase and improve the pedagogical skill of a higher school teacher.

**Tasks:**

1. To consider the formation of pedagogical skills of a higher school teacher as a pedagogical problem, to reveal the essence of the key concepts of the phenomenon under study.
2. Formation of skills and abilities of pedagogical technique.
3. Application of best pedagogical practices.
4. Formation of professional competencies and qualities of a future teacher.

**Research methods:** theoretical – analysis of scientific literature on philosophy, psychology, pedagogy to substantiate the theoretical foundations of research and determine the essence of leading scientific concepts, to identify the essence and specifics of the formation of pedagogical skills of a higher school teacher; empirical – diagnostic, raising the level of pedagogical skills at Pavlo Tychyna Uman State Pedagogical University.

## **Literature Review**

The issue of pedagogical skills has always been the subject of attention of many prominent domestic and foreign teachers and psychologists. Suffice it to mention the names of Fitsula (2006); Kaidalova, Shchokina, Vakhrusheva (2009); Kuzminsky (2005); Ziaziun (2005) and others. The scientific works cover the

issues of professional training of the teacher, consider the conditions for the formation of pedagogical skills, its components. The authors derive their understanding of such a complex phenomenon as pedagogical skill.

V. Denysenko (2022) believed that the secret of pedagogical skill lies in the knowledge of the features of the pedagogical process, the ability to build it and set it in motion. Therefore, mastering pedagogical skills is available to every teacher if he works on himself, since the basis of its formation is, first of all, practical experience. "By educating others, we educate, first of all, ourselves." – wrote Ziaziun (2005).

The issues of formation of professional skills are analyzed in the scientific research of S. Vitvitska (2012); L. Kaidalova et al. (2009); B. Levkivsky (2005) and others. The structure of pedagogical skills was studied in the works of O.A. Lavrinenko (2021) and M. Fitsula (2006). Issues related to the training of scientific and pedagogical workers, improvement of their qualifications and pedagogical skills are disclosed in the scientific work of A. Kuzminsky (2005); V. Slipchuk, H. Yuzkiv, T. Lutaieva, N. Batechko., M. Pisotska (2021) and others. Improving pedagogical skills as a condition contributing to the academic mobility of a teacher has not yet been the subject of research.

### **Methodology**

In the era of modern information and educational technologies, in the period of development of distance learning, the priority source of systematic knowledge transfer, their indispensable repeater is the teacher, who provides high quality education. This determines the teacher's need for constant self-improvement, self-development, and improvement of their professional skills. In the context of this problem, of particular interest is the formation of pedagogical skills of a higher school teacher. At the present stage of education development, a higher education institution needs a teacher who is labile, capable of self-development and self-determination in a constantly changing situation, open to the social order of education, ready for self-improvement, high-quality, skillful implementation of knowledge, skills and abilities in professional activities (Kaidalova, Shchokina & Vakhrusheva, 2009).

One of the prerequisites for solving an important and complex task of training competitive specialists is the development of pedagogical skills of a higher school teacher, in particular, by improving the psychological and pedagogical training of future teachers and forming their readiness for professional self-improvement, self-development, and through it – productive pedagogical activity. The magnitude of the problem under study requires consideration of the development of pedagogical skills of a teacher of a higher education institution as a multifactorial, complex process (Levkivskyi, 2005).

During the research, we paid attention to the study of scientific achievements related to the training of scientific and pedagogical workers, improving their

qualifications and pedagogical skills in the higher education system, highlighted in the works of the following scientists: Vitvitska (2012), Kaidalova et al. (2009), Kuzminsky (2005), Levkivsky (2005).

The results of the literature review showed that, despite a significant number of publications devoted to the problem of pedagogical skills, an unambiguous understanding of the essence of this concept is virtually absent and is often identified with professional competence. Indicators of successful professional activity of a teacher are a complex of such interrelated characteristics as: pedagogical skills, professional competence, professionalism, pedagogical abilities, between which there is a connection.

### **Research results**

The essence of the concept of "pedagogical skills" is quite multifaceted and widely covered by many scientists. Each researcher in this field examines a specific aspect of the teacher's activity that, in his opinion, best reveals the essential characteristics of pedagogical excellence. There are several approaches to defining pedagogical excellence and its structure.

The concept of "pedagogical skill" is quite widely and fully disclosed in the *Khrestomatiya "Pedahohichna maysternist"*: "... This high art of education and training, which is constantly improving, is available to every teacher who works by vocation and loves children. A teacher is a specialist of high culture, who has a deep knowledge of his subject, is well acquainted with the relevant branches of science or art, is practically versed in the issues of general and, especially, child psychology, is fluent in the methods of teaching and upbringing." (Ziazyun, Bazydevych, Dmytrenko et al., 2006).

Pedagogical skill is a high art of teaching and upbringing, which is constantly improving. Improving pedagogical skills is available to every teacher. Pedagogical skills are formed on the basis of pedagogical activity.

In Ziazyun's anthology, "mastery" is defined as a specifically human form of activity, in the process of which a person consciously, in accordance with the set goal, transforms the world around him and himself. At the same time, he imagines the final result that he wants to achieve, develops a program of actions to achieve this result, chooses the means and methods of activity that will allow him to do this, and upon completion of the activity, compares its results with the planned ones and determines how much he managed to achieve the goal (Ziaziun, 2005).

Thus, the scientist considers pedagogical skill "as the highest level of pedagogical activity (if qualitative indicators of the result are characterized), as a manifestation of the creative activity of the teacher's personality (if the psychological mechanism of successful activity is characterized)". As a pedagogical category, he defines it as follows: "pedagogical skill is a complex of personality properties that provides a high level of self-organization of professional activity on a reflective basis." Pedagogical excellence is a dynamic

system. Its components are humanistic orientation, professional competence, pedagogical abilities, pedagogical technique (Ziaziun, Kramushchenko, Kryvonos et al. 1997).

O.A. Lavrinenko believes that pedagogical skill is a high art of teaching and upbringing, which is constantly improving, the basis of which is professional knowledge, skills and abilities. Pedagogical skills are based on pedagogical skills (didactic, organizational, communicative, perceptive, suggestive, scientific and cognitive, prognostic, research), as well as on emotional stability and the ability to pedagogical improvisation (Lavrinenko, 2021).

According to N. Machynska, pedagogical skill is a set of personality qualities that ensure a high level of self-organization of the teacher's professional activity, the components of which are professional knowledge, pedagogical technique, pedagogical abilities, pedagogical morality, professionally significant qualities (benevolence, objectivity, exactingness, decency, optimism, self-control) and external culture. All these components create the prerequisites for the transformation of pedagogical activity on art, which is a lengthy and complex process. The final stage of this process is pedagogical innovation, when the teacher introduces fundamentally new ideas into the educational process, develops new methodological systems, and creates new pedagogical technologies (Machynska, Fedorovych & Yaremchuk 2020).

As a result of the analysis of the works of scientists, we have given a definition of the concept of "pedagogical skill" – it is a complex, multifaceted system that can be modeled for the purpose of its deeper cognition (Levkivskyi, 2005).

Modern scientists note that the multifaceted nature of pedagogical activity cannot be determined by individual abilities, the personality of a teacher with an arsenal of various qualities is a condition for successful work, so pedagogical skill is somewhat dependent on these qualities.

Essential in determining the role and functions of pedagogical skills in the system of higher education is its development as a complex organizational system that involves the process of formation, formation and development of the teacher's personality. Pedagogical activity is carried out in different areas: training, upbringing, management of students' activities, and each of them can manifest the pedagogical skill of the teacher, the basic foundation of which is the following elements: the content of the teacher's education; professional experience; experience of manifestation of personal qualities in professional and pedagogical activities, that is, an internal model of behavior.

The logic of constructing pedagogical skills can be represented in a peculiar way by the formula: "knowledge – experience – personality". Also, pedagogical skill is understood as a complex of personality properties, which ensures a high level of self-organization of the teacher's professional activity.

The purpose of professional and pedagogical activity is the changes that the teacher predicts in the development of the personality and professional

competence of the future teacher. Taking into account the content and purpose of professional and pedagogical activity, its structure is determined.

In the structure of this activity, a key role is played by its participants and the relations between them. It is possible to represent them using three models:

*subject-object*, where the subject (S) is the teacher, and the student (O) is the object; *subject-subject*, where both the teacher and the student are subjects (S);

*subject-object-subject*, where the teacher is the subject S, and the student is both the object and the subject (O = S).

*Subject-Object Model of Pedagogical Activity*

$$S \rightarrow O$$

This model is the basis of authoritarian, knowledge-based pedagogy, in which the teacher is considered the main person in the pedagogical process that teaches, educates and provides the profession of teacher to the student. At the same time, the student is perceived as a passive object of the teacher's pedagogical influence, without taking into account the level of his capabilities, desires, and feedback. The criterion for the quality of such pedagogical activity is evaluation.

*Subject-Subject Model of Pedagogical Activity*

$$S \leftrightarrow S$$

This model is the basis of humanistic, personality-oriented pedagogy, in which the teacher and the student are considered equal partners in the pedagogical process, who jointly master the profession of a teacher while the student acquires the necessary professional knowledge, skills, and ways of acting. At the same time, the student is perceived as an active subject of his own educational and professional activity, which he carries out taking into account his capabilities, desires, embodying them in the feedback to the actions of the teacher of the higher education institution. The object of activity is the process of guidance by a teacher of the educational activity of a student of a higher education institution, carried out by him/her independently. The criterion for the quality of such pedagogical activity is the student's ability to learn independently (competence of self-improvement). Since the organizer and communicative leader of professional and pedagogical activity is still a teacher who exerts an educational and professionalizing influence on the pupil, which he accepts or resists him, there is a need to clarify the subject-subject model of professional and pedagogical activity by visualizing the communicative and organizational role of the teacher:

*Subject-Object-Subject Model of Pedagogical Activity*

$$S \rightarrow (O = S)$$



In this model, the teacher of vocational training is the subject who exerts pedagogical influence on the student in order to encourage him to his own activity to master the profession of a teacher, and the student perceives this influence and carries out appropriate educational actions of his own. In accordance with the stages of activity, which, as a rule, are consistent with its tasks and functions, functional elements of professional and pedagogical activity are distinguished: orientation and analytical, gnostic, designing, constructive, organizational, communicative, evaluative and correctional.

The main components of professional and pedagogical activities are listed in Table 1.

*Table 1. Main components of professional and pedagogical activities (made by authors)*

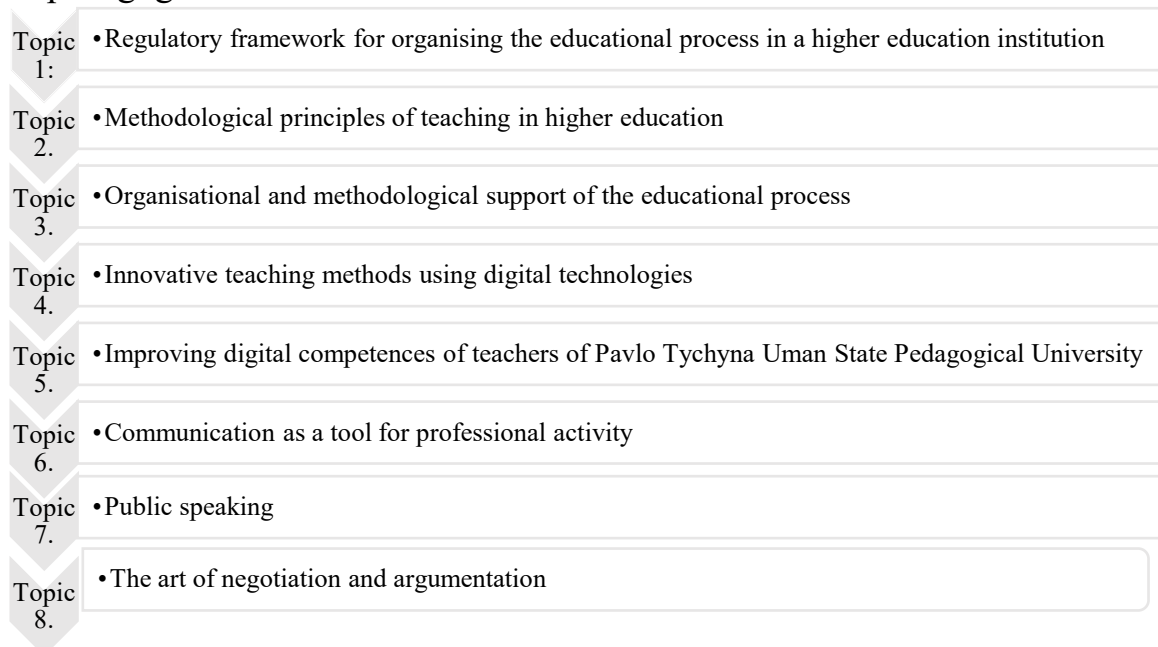
Components	Activity	
	Production	Pedagogical
Subject	Engineer, Technician, Worker	Teacher
Object (subject)	Objects of work: materials, technologies	Formation and development of the student's personality
Tools	Equipment, mechanisms	Methods and means of teaching and upbringing, the personality of the teacher
Result (product)	Material values	Spiritual values: education, good manners, professional development of the individual

The implementation of all components will ensure a high-quality educational process, creative self-development and self-realization of the teacher in the process of pedagogical activity. Methods and methods of scientific and pedagogical activity are individual and subjective in nature and their use depends on the abilities of each teacher.

We have developed a model for improving the level of pedagogical skills, which corresponds to the Resolution of the Cabinet of Ministers of Ukraine No. 800 of August 21, 2019 on the procedure for advanced training of pedagogical and scientific-pedagogical workers, the Regulation on the procedure for exercising the right to academic mobility by participants in the educational process of Pavlo Tychyna Uman State Pedagogical University.

Model (Fig. 1). includes 8 topics for improving the level of pedagogical skills for teachers of higher education institutions. The main purpose of the model implementation is the development and improvement of pedagogical skills, advanced training of teachers of a higher education institution, the formation of readiness for innovative educational activities, academic mobility, acquaintance with modern technologies of organization and self-organization of pedagogical activities in a higher education institution. The task of the model of pedagogical excellence is to promote the mastery of modern methods and techniques of organizing the educational process and one's own pedagogical skills, solving

psychological and pedagogical problems in the education and upbringing of students, implementing a specialist training program in higher education, implementing the ideas of pedagogical skills in the practical activities of scientific and pedagogical workers.



*Figure 1 Model for improving the level of pedagogical skills (made by authors)*

On the basis of the Faculty of Social and Psychological Education of Pavlo Tychyna Uman State Pedagogical University, a model of pedagogical excellence was implemented – 8 lectures were held for teachers of higher education institutions. As a result of the implementation of the model of pedagogical excellence, teachers have a high-end result of their individual potential in pedagogical skills. It is found that this form of advanced training is the most effective and optimal in terms of the development of pedagogical skills of a higher school teacher.

## **Conclusions and discussion**

So, on the basis of the analysis of scientific works of domestic and foreign scientists who have studied the problems of pedagogical skills, we conclude that pedagogical skill is a complex, multifaceted system that can be modeled in order to understand it more deeply. Thus, the completeness of awareness of the depths of the profession, mechanisms and boundaries of one's own activity, being one of the essential signs of the skill of a teacher of a higher school institution, forms the ability to set and solve (within their competence) professional tasks of any level of complexity – from applied to methodological. This makes it possible to transfer the teacher's pedagogical skills to future specialists in higher education. The forms of transfer of experience are diverse, multifaceted, but in any case, they necessarily contain not only a description, demonstration, but also the transfer of

meaning, principles, values, technologies of pedagogical work that ensure the reproduction of professional actions by others. A special place in the ascent of the teacher to the heights of mastery is given to practical activity, in the course of his direct involvement in the performance of professional functions.

Thus, the task of a higher education institution is to help a future teacher master the basics of mastery for a conscious and productive start of professional activity: to form a humanistic orientation, to give thorough knowledge, to develop pedagogical abilities, to equip with the technique of interaction, to prepare for professional analysis of a wide variety of pedagogical situations.

Therefore, the effective organization of the mechanism for improving professional competence and increasing the level of professionalism of the teacher in the information and educational space of a higher educational institution is a prerequisite for the growth of the professional qualification of the entire teaching staff. At the same time, it should be noted that scientific research on the study of the phenomenon of "pedagogical skills of a teacher of a higher education institution" continues. Selected components of the development of pedagogical skills, professionally sown in the field of creativity of national education by I. A. Ziazyun, germinate in the scientific achievements of different generations of researchers of Ukraine and return to the practice of higher education a hundredfold.

Creative cooperation and cooperation of the teacher (high school teacher) and his pupils (students) will contribute to the creative self-development and self-realization of all participants in the educational process, including the improvement of the teacher's professional skills in the process of professional activity.

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**SKOLAS PEDAGOĢIJA**  
*School Pedagogy*

# ENGAGEMENT OF STUDENTS IN ONLINE LEARNING PLATFORMS: FOLLOW-UP STUDY IN LITHUANIAN GENERAL EDUCATION SCHOOLS

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**Abstract.** *Online learning platforms with integrated tools of learning analytics (LA) and artificial intelligence (AI) are growing in popularity in general education in Lithuania. Such platforms have a number of advantages in terms of the teaching-learning process, however, there is a lack of research about such aspects of use platforms in general education schools. The follow-up study was organized in schools that participated in the DIMA project for three months and tested different platforms with learning analytics and artificial intelligence components - LearnLab and Eduten Playground. The study aimed to monitor children's progress with the platform, tracking interest and engagement. The same questionnaire was given 3 times within the period of one month. In total, 977 responses were received: 404 students completed in first time; 281 completed second and 252 completed 3d time. Results have showed that the students feel positive about working with online learning platforms, moreover every single time are becoming more engaged in the learning process, since they get acquainted navigation and operation of the program. As a result, the engagement of the students into online learning platforms depends not only on the quality or other features of online learning platforms, but also the ability of students to navigate within the program.*

**Keywords:** *engagement of students, general education schools, online learning platform.*

## Introduction

In recent times, the issue of digitalizing education has gained prominence, especially in EU nations like Lithuania. The COVID-19 pandemic expedited this digital shift, integrating digital technologies into the teaching and learning processes. This incorporation of technology has proven essential for maintaining educational standards during a pandemic, necessitating schools and educators to ensure continuity in education delivery and adapt swiftly to new teaching methods (Cabero-Almenara, 2020; Rupšienė et al., 2021). This surge in educational digitalization has led to the rapid evolution of educational technologies such as computer-based learning environments, adaptive learning technologies, intelligent learning systems, and "smart classrooms." These technologies accumulate vast amounts of data about learners.

Within scholarly discourse, the endeavor to utilize teaching and learning data to enhance educational practices is termed learning analytics (Long, Siemens, 2011; Romero, Ventura, 2013). Learning analytics serve various purposes in the classroom, including monitoring and analyzing student learning, predicting learning outcomes, planning to teach strategies, personalizing learning experiences, and providing assessment and feedback (Vourikari et al., 2016; Chatti, Dyckhoff, Schroeder, Thüs, 2012; Moissa, Gasparini, Kemczinski, 2015; Pineda, Cadavid, 2018). The potential benefits of learning analytics, such as personalized learning recommendations for students and teachers, are widely acknowledged and proven effective for tracking individual learning progress (Pineda, Cadavid, 2018).

The growing significance and advantages of online learning programs in education are evident from the increasing integration of data analysis technologies into digital tools and platforms. Both commercial tools like MS Teams, Google Classroom, iSpring Learning, and open-source platforms like Moodle, now incorporate data analytics technologies aimed at various educational sectors.

Online learning platforms offer educators insights necessary for enhancing classroom instruction, personalizing training, providing effective feedback, and ensuring educational quality by identifying at-risk student groups (Long, Siemens, 2011; Mangaroska et al., 2019; Ifenthaler et al., 2020; Kurvinen et al., 2020; Mangaroska, Giannakos, 2018). Moreover, successful utilization of learning analytics tools in schools' hinges on teachers' perception of their benefits and their adeptness in utilizing them (Mayer, 2019; Zhu, Urhahne, 2018).

The current study is oriented to monitoring children's progress with the platform, tracking interest and engagement. With main objectives: which devices were used by the pupils when working with the online learning platform; to determine the conditions in the school when working with the online learning platform; to determine how engagement with the online learning platforms has changed during the period.

### **Online learning platforms**

Online learning platforms and their use in schools are becoming increasingly popular. Such platforms have several advantages for the teacher and the learning process: they allow for faster assessment of student performance (Laakso, 2010), faster feedback to students (Butz, Hua, & Maguire, 2006), personalisation of the learning process (Rodrigo, Baker, Agapito, Nabos, Repalam, Reyes, & San Pedro, 2012), and a host of other benefits (see e.g. Hamed, Abu-Naser, & Abualhin, 2018). Research also shows that students using digital learning platforms demonstrate significantly better learning outcomes, even after a short period of use (Christopoulos, Kajasilta, Salakoski & Laakso, 2020), and are more engaged in the learning process, leading to increased motivation and willingness to learn

(Kaila et.al, 2015), and positive perceptions of their satisfaction with the learning process (Youssef et al, 2015). Research also shows that teachers (Manny-Ikan et al, 2016) and children do not face significant challenges in the platform (Kaila et al., 2015). According to Kaila et al. (2015) in a short survey after the use of the ViLLE platform, the following was found: the students) did not encounter any technical problems when using the platform, they found it easy to use the platform, and 95 % of the students would rather take the exam with the platform than with a paper and pen. However, there is a lack of detailed research in the academic literature on students' access to platforms at school and at home, as well as on their abilities and satisfaction, especially in the context of the COVID-19 pandemic period.

In the light of the literature review, a questionnaire for students was developed. The questionnaire was developed taking into account Rekhawi's questionnaire for the development and testing of an intelligent tutoring system on the ability to use intelligent tutoring system platforms, as well as the questionnaire on the ability to use intelligent tutoring system platforms developed by the researchers Rodrigo et al. (2012) research on students' emotional states when using an intelligent tutoring system, as well as to Seleviciene's (2020) dissertation which uses an improved TAM model (Davis, 1989) to investigate 5 dimensions: awareness, ease of use, attitude towards usefulness, and intention to use, as well as to the research of Bernacki, Nokes-Malach Aleven (2012) on the motivation of learners to learn with intelligent learning platforms. The questionnaire also included questions about learners' ability and conditions to use the platforms at home and at school.

## **Methodology**

The follow-up study was organized in schools that participated in the DIMA project for three months and tested different platforms with learning analytics and artificial intelligence components - LearnLab and Eduten Playground. The aim of the study was to monitor children's progress with the platform, tracking interest and engagement. One of the conditions is that the pupils complete the questionnaire as many times as possible during the whole period of working with the online learning platforms (at least once a week, but not less than 3 times) between 15 October and 30 November. The study involved a survey questionnaire with questions on socio-demographic characteristics of the participants, device availability when using the learning platforms, conditions, and evaluation of the platforms according to the time of use.

The data were collected through an electronic (Google forms) survey during the period 2020 October- December. The questionnaires were sent to students after each lesson with LearnLab or Eduten Playground. Before the survey was



organized, teachers received detailed instructions on how to conduct the survey. The survey took place between 15 October and 30 November.

Statistical data were processed in SPSS and graphs were created in Microsoft Excel.

The questionnaires were completed a total of 977 times. 404 pupils completed the questionnaire once, 281 pupils completed it 2 times, 252 pupils completed it 3 times and 40 pupils completed it 4 times. However, for the analysis only 3 times were taken. In total, 424 Eduten Playground licences and 550 Learnlab licences have been granted in the project. A large number of students have been granted access to both platforms.

Limitations of the study. Due to the high turnover of children (due to illness, isolation and other reasons), it was not possible to collect a consistent number of questionnaires in all three sessions during the school day. Also, as the questionnaire was only asked to be completed for the lesson in which the student was working with the software (e.g. if today a student worked with Eduten Playground in one lesson and Learnlab in another, he/she completed the questionnaire twice. If a student worked with the same online learning platforms in several lessons today (e.g. in Lithuanian and Chemistry with Learnlab), he/she only had to fill in the form once. Therefore, the number of responses is not even. And even 3 schools worked particularly hard with the above-mentioned online learning platforms, so it was possible to complete the questionnaires 4 times each.

## **Research results**

In total, 977 questionnaires were completed from 11 schools. 404 pupils completed the questionnaire once, 281 pupils completed it twice, 252 pupils completed it 3 times and 40 pupils completed it 4 times. The participants were pupils in grades 1-8. In total, 542 questionnaires were completed for the Leanlab platform and 435 for Eduten Playground. The participants were pupils from 11 schools in Klaipėda, Neringa, Raseiniai, Šiauliai and Vilnius. In total, 397 pupils were surveyed. The participants were pupils in grades 1-8. The highest number of participants was in Year 6 - 28% and in Year 3 - 20%. The lowest participation rate was 5.29% for first graders. During the survey, students were asked to indicate which platform they worked with during the lesson. There was an uneven distribution of responses. In the first and second rounds, the highest number of completed questionnaires was on Learnlab, and in the third round on Eduten Playground.

The first time the students answered, they said they had worked with the software at school, in a computer class. In contrast, the third time around, there is a trend towards more students working in their classroom. This change was since during the school project, the schools purchased more devices to work with the platforms, which could be used already in their classrooms (see Figure Nr. 1)

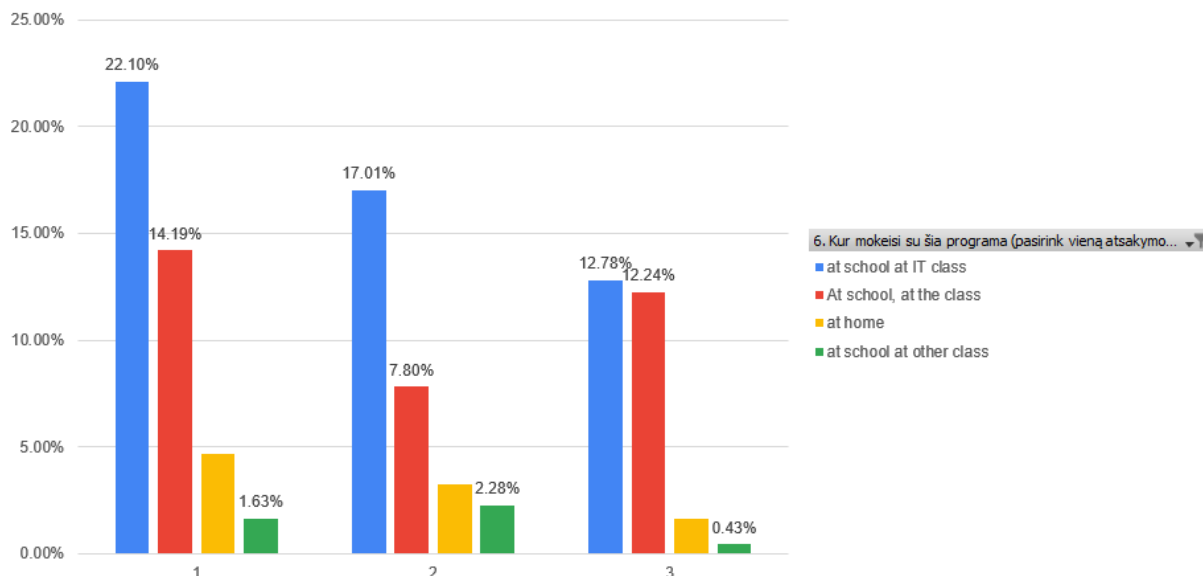


Figure 1 Places where students used online learning platforms (created by authors)

When asked about the number of people, students indicated that 1 person was sitting at the device on the first and second time they worked with the online learning programs (on the first occasion: 83% working alone, 17% working with 2 people; on the second occasion: 79% working alone, 21% working with 2 people). However, for the third time, they worked on the online learning platform with a classmate or peer (63% indicated that they worked with a classmate/peer and 37% that they worked alone) (See Figure 2). This change could also be since more schools have purchased devices that could be used in the classroom, but which were used by two students. Among the responses, pupils had indicated that they worked in threes or in groups.

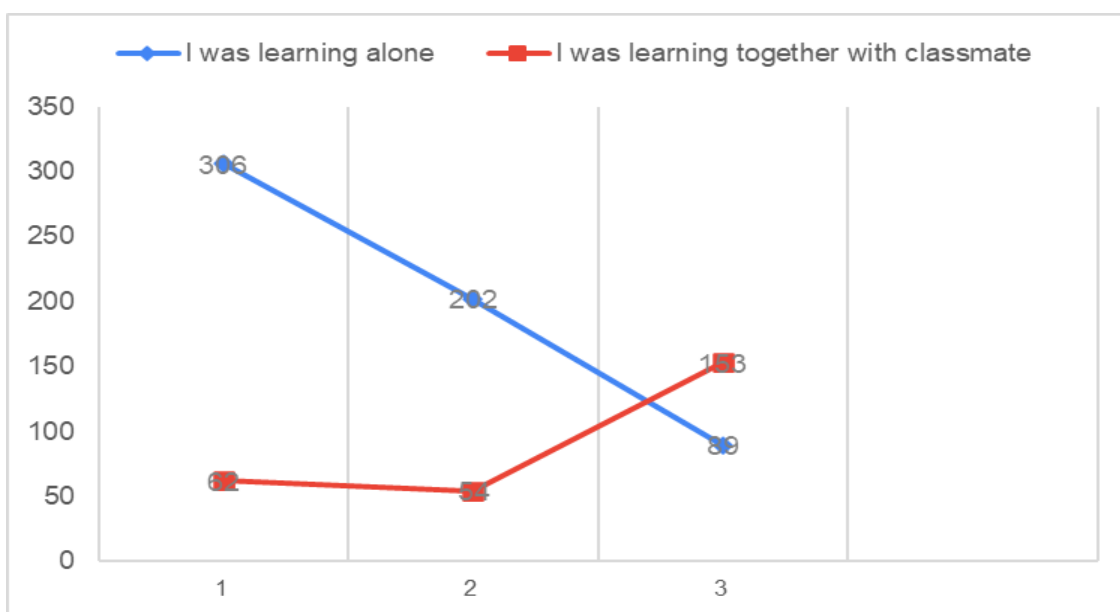


Figure 2 Learning conditions (created by authors)

The students were asked to answer questions related to distractions and engagement with the platform. For the question "I found it easy to connect to the computer/tablet during the lesson", the majority answered Definitely Yes, which increased with each answer (1 time - 75.7%; 2nd time -75.7%3rd time -77.0%) and Yes (1 time - 13.9%; 2nd time - 14.2%, 3rd time -14.2%). In response to the question "I found it easy to join the program", the overwhelming response was Definitely Yes, which increased with each answer (1 time - 75.7%; 2nd time - 74.0%, 3rd time - 80.2%) and Yes (1 time - 13.6%; 2nd time -16.7%, 3rd time - 15.1%) (See Table 1). These results show that each time the students find it easier to join the programme.

Moreover, students were asked to answer the question "In the lesson, I was clear about what to do when to do it, and what tasks to do in the online learning platform. Most of them indicated that it was really easy to use the online learning platform, but not for all logins. This was the case for Definitely Yes (1 time - 76%; 2nd time -82.9%, 3rd time -75.8%) and Yes (1 time - 16.35%; 2nd time - 12.8%, 3rd time -17.5%). It can be assumed that clarity is highly dependent on the topic of the lesson. Especially if the lesson involved trying out new features of the software.

*Table 1 Students's opinion about working with the online learning platforms (created by authors)*

	1st time		2nd time		3rd time	
	Definitely Yes	Yes	Definitely Yes	Yes	Definitely Yes	Yes
I found it easy to connect to the computer/ tablet during the lesson	75.7%	13.9%	75.7%	14.2%	77.0%	14.2%
I found it easy to join the program	75.7%	13.6%	74.0%	16.7%	80.2%	15.1%
It was really easy to use the online learning platform	76%	16.35%	82.9%	12.8%	75.8%	17.5%
It interesting to learn with the online learning platform	79.5%	15.6 %	75.8	16.7%	80.2%	13.1%)
I liked learning with the platform	80.2%	13.9%	76.5%	16.4%	82.9%	9.5%
I would like to continue working with the program	78.2%	16.3%	73%	16.7%	74.2%	15.9%

The students who took part in the survey also gave their views on how much fun they found learning with the online learning platform. The vast majority indicated that they found it interesting to learn with the online learning platform

Definitely Yes (1 time - 79.5%; 2nd time - 75.8%, 3rd time - 80.2%,) and Yes (1 time - 15.6 % 2nd time - 16.7%, 3rd time - 13.1%). Very similar answers were given to the question "I liked learning with the platform". The answers were Definitely Yes (1 time - 80.2%; 2nd time - 76.5%, 3rd time - 82.9%,) and "Yes" (1 time - 13.9%; 2nd time - 16.4%, 3rd time - 9.5%).

Once the platforms have been positively evaluated by the students, they would like to continue working with them. The first time around, the majority were particularly positive about the platform, while after the second time around the willingness to learn more with the platform decreased slightly. Definitely yes (78.2% on the first time; 73% on the second time; 74.2% on the third time) and yes (16.3% on the first time; 16.7% on the second time; 15.9% on the third time).

Moreover, students were asked how they feel about working with online learning platforms. They were selecting from several options after they experience with the platform and were allowed to pick several answers from the options. As we can see from the figure Nr. 3 every time, students were interested in learning in the platform and were engaged while working in it. Only 7 students mentioned that they felt insecure while they were working with the platform for the first time, while no one have mentioned the same during the 2<sup>nd</sup> and 3<sup>rd</sup> time. However, it is important to mention, that the number of students who mentioned that they were bored have increased from 5 students (1<sup>st</sup> time) to 17 (3<sup>rd</sup> time).

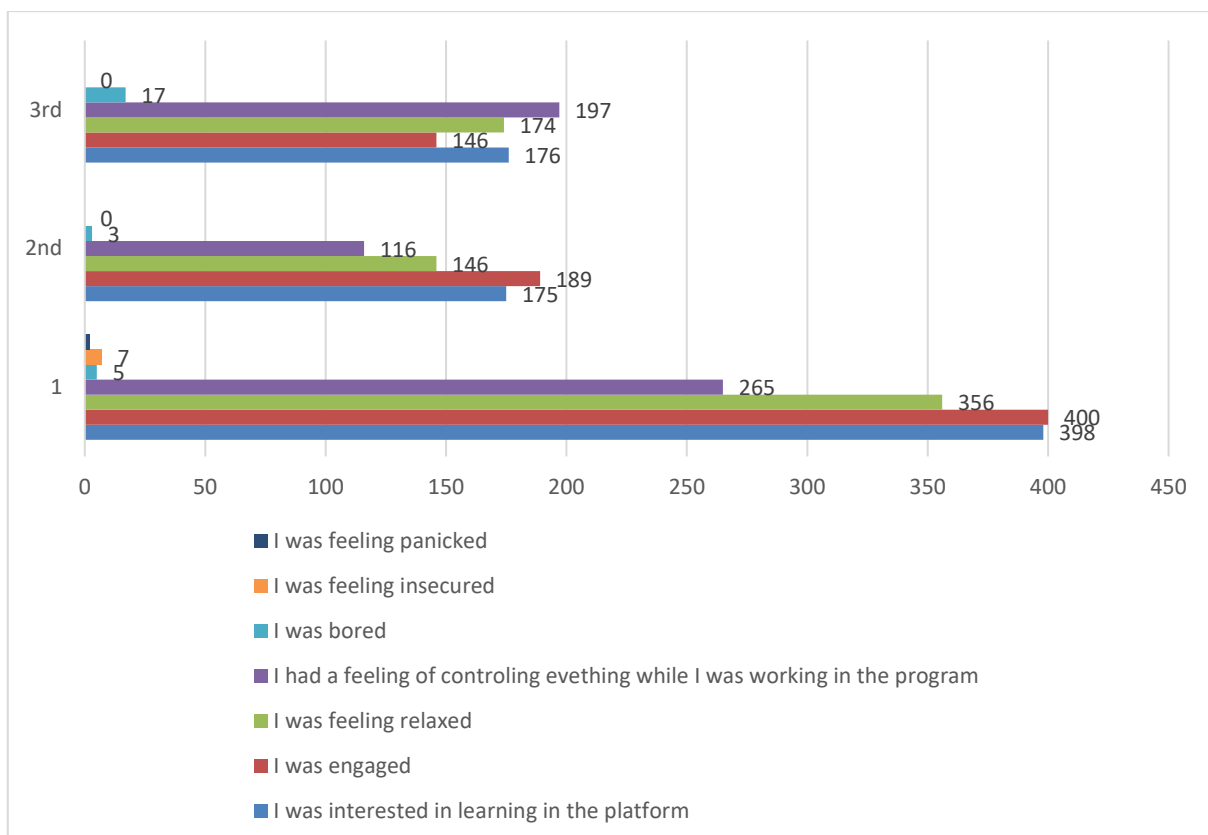


Figure 3 *Engagement into learning with online learning platforms, number of times (created by authors)*

## Conclusions

The results of the survey showed that not all schools were able to collect the required number of responses. The responses showed that most of the students worked with the online learning platforms in schools using school computers or tablets. However, there are still cases where pupils have to use their personal devices or devices not directly dedicated to the platform: mobile phones.

Pupils usually have to go to the computer lab to work with the online learning platforms, but there is already some evidence of classroom use. This change is since during the school project, schools have purchased more devices to work with the platforms, which pupils could already use in their classrooms.

In general, the pupils are very positive about working with the platform and each time they work, it becomes easier to navigate (navigate within the platform) and to manage the platform, e.g. it is clear what to click on and where to tick when I wanted to select colours, pictures, tasks or answers, how to switch, save, etc.). Also, most of them had no difficulties with connecting to the device, which shows that the students know how to use the computer equipment. However, the issue of online connectivity and interference with the internet is still a concern. This aspect, although positive, was translated by fewer students.

In the lesson, the students felt anchored, they were clear about what they had to do and when they had to do it, what tasks they had to do in the software and what they had to learn in the lesson. And they find it interesting and enjoy working with the online learning platforms and that interest came with each one.

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# PEDAGOGICAL CONDITIONS FOR THE FORMATION OF READING CULTURE OF EDUCATION SEEKERS IN UKRAINIAN AND GLOBAL PRACTICE

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**Abstract.** *The aim of the article is to consider the formation of reading culture as an important pedagogical problem of today in the context of domestic and global problems of the development of students' reading literacy, to single out the pedagogical conditions for the formation of the reading culture of an individual.*

*Ukrainian and foreign scientists, teachers, and common people emphasize the crisis of children's reading: children and youth do not have a developed interest in this field of study, there is no motivation to read. This is a global trend.*

*Pedagogical conditions for the formation of the reading culture of an individual are highlighted: from the teacher's point of view, this is high-quality preparation for teaching schoolchildren to read, mastery of a high level of reading culture, reading practice, children's reading circle; students believe that this is the activation of independent reading activity aimed at the development of abilities, interest in literature, improvement of knowledge, reading abilities and skills, active reading activity; parents think that it is the possession of reading culture, interest in reading, desire to ensure that fiction books do not lose their educational role among children, so that the great spiritual potential of fiction does not remain outside their attention, etc.*

**Keywords:** *adults, children and youth, education, education seeker, formation of reading culture, new Ukrainian school, reading, Ukrainian and world literature, upbringing.*

## Introduction

Reading is a basic component of Ukrainian education and upbringing, cultural development in general. It is an activity that forms and develops a young



personality, it is a means of obtaining an education and forming a culture, achieving human success in life. Considering this, the role of reading in the development of a child, his spiritual world, intelligence, imagination, mastering his native language, achievements of national and world literature, oral and written speech, development of literary creative abilities, etc., is huge. Under the conditions of the new Ukrainian school, the digitization of education, the importance of reading as a basic intellectual technology, the most important resource for personal development and a source of knowledge acquisition is being actualized. For Ukrainians, like other nations, reading is a means of preparation for life in the global information space as well as many other things. Taking into account the analysis of the situation that has developed in Ukraine regarding the reading practices of children, youth and adults, a number of problems that need to be solved are urgent: first of all, we are talking about a low level of reading activity, and therefore reading culture and reading literacy, unformed reading skills; lack of motivation to read among Ukrainians, especially students; insufficient promotion of reading, lack of “reading fashion” among children and youth; insufficient supply on the Ukrainian book market of high-quality modern Ukrainian-language literature in public libraries, primarily in rural areas, low level of purchasing power of both adults and children and youth; insufficient amount of infrastructure for purchasing books, obtaining information about new editions; insufficient support for reading practices in social networks, the media, lack of popular media that support the idea of propagandizing reading; the absence of a targeted educational policy regarding the promotion of reading in all educational and training institutions, starting from preschool education institutions (PEI), ending with higher education institutions (HEIs), adult education; lack of proper information digitization of libraries, offering of Ukrainian book content in public, school, and higher education libraries; the personnel factor, which will be manifested in the insufficient training of both librarians and teachers-beginners, teachers of extracurricular institutions, educators of special education, etc., the insecurity of the Ukrainian book market from pirated products and competition with the influx of Russian book products; lack of early childhood reading experience and reading culture, as well as self-identification with consumers of Ukrainian-language book content; other factors of an objective and subjective nature. Only active large-scale (at the state level) promotional activities aimed at supporting and developing reading at the national level will make it possible to increase the number of book lovers in Ukraine, expand the readership, and educate the young generation as readers who possess critical thinking, reading competence, key skills, high the level of spiritual values that fiction can create. This will be served by the use of productive world experience in the development and support of reading among children and adults.

The aim of the article is to consider the formation of reading culture as an important pedagogical problem of today in the context of domestic and global

problems of the development of students' reading literacy, to single out the pedagogical conditions for the formation of the reading culture of an individual.

### **Methodology**

To solve the tasks, a set of research methods was used i.e. theoretical: theoretical-methodological analysis of pedagogical, psychological and methodical literature devoted to the problem of systematic development of students' reading culture; Ukrainian and foreign program and normative documents regarding the development and support of reading, organization of the process of formation of individual reading competence; search and bibliographic (study of library funds, bibliographic editions of Ukraine and leading countries of the world, library and bibliographic indexes and fiction for children of primary school age, online resources of libraries); method of studying and systematizing advanced teaching experience Ukraine and the world regarding the formation of reading practices of children and youth; retrospective (analysis of the problem of formation of a reading culture, the role of books in the development of a child's personality, systematization of the source base); empirical: observation, interview, questionnaire, ranking, analysis of library subscriptions, reading diaries, surveys of teachers, students, library workers; methods of mathematical statistics, graphic processing of experimental data.

### **Results and discussion**

One of the key tasks, as stated in the Concept "New Ukrainian School" (hereinafter – NUS) (2017), is the formation of a comprehensively and harmoniously developed personality of the student (Ministry of Education and Science of Ukraine, 2017). The purpose of primary education is "comprehensive development of the child, his talents, abilities, competences and comprehensive skills in accordance with age and individual psychophysiological characteristics and needs, formation of values, development of independence, creativity and curiosity" (State sites of Ukraine, 2018).

The interest in reading formed at the primary school age is a prerequisite for the further intellectual and spiritual growth of the student at the first level of general secondary education. Therefore, the task of the primary school is to instill in a younger student reading interests, a taste for reading, the need to read independently, a desire to expand the circle of reading constantly, etc. (Bilavych, & Rozman, 2016; Fasolya, 2016; Fentsyk, & Larynova, 2017; Skoblikova, 2014; Yatsenko, 2008).

Nowadays, scientists agree that the problem of reading/non-reading is an important and relevant issue of educational theory and practice. That is why it is so important to form the reading culture of students, the criteria of which,

according to the definition of Ukrainian scientists (Bondarenko, 2020; Bilavych, & Rozman, 2016; Fasolya, 2016; Fentsyk, & Larynova, 2017; Skoblikova, 2014; Yatsenko, 2008) as well as foreign researchers (Alexander, 2005; Anderson, Wilson, & Fielding, 1988; Chapman, & Tunmer, 1995; Conradi, Jang, & McKenna, 2014; McGeown, Osborne, Warhurst, Norgate, & Duncan, 2016; Pfof, Dorfler, & Artelt, 2013), is the process of forming a valuable attitude towards the book in students of education; formation of sustained interest in reading fiction; navigate the book world, be able to choose an interesting book to read; the ability to analyze what has been read, to react emotionally to a book, the ability to aesthetically perceive an artistic text, to find valuable and meaningful information in a work, the formation of students' need for reading practice, the awareness that there are significant differences in the intellectual development of a student who reads and one who belongs to the category of non-readers (students who actively read are able to think in categories of problems, grasp the whole and identify contradictory relationships of phenomena; assess the situation more adequately and find the right solutions faster; have a larger memory and active creative imagination; better command of speech: it is more expressive, normative, lexically rich, emotional, figurative, logical; formulate the opinion more precisely and express it freely; make contacts more easily and are pleasant in communication, have speech etiquette and speech etiquette formulas; have a greater need for independence and inner freedom, are more critical, independent in their judgments and behavior).

An education seeker who has a reading culture is characterized by a valuable attitude towards reading and knowledge gained by reading literature accessible in content and form (why read?); reader's outlook and literary ideas; knowledge of the circle of reading in its genre and thematic variety (what to read? what to read about?); the ability to perform the necessary reading actions in working with a book and a work for the formation of reading practices; productive ways of reading, quality reading skills (how to read?); formed IT skills, bibliographic literacy, etc.

Education of a reading culture consists primarily of the habit of systematic daily reading. Therefore, it is important to form a reading culture of students at the NUS, the criteria of which, according to the definition of Ukrainian and foreign scientists, is a pedagogical purposeful process of educating students in a valuable attitude to books; formation of sustained interest in reading; the ability to navigate the world of books, the ability to find it both in the library and on the Internet; the ability to analyze what has been read, to perceive an artistic text aesthetically, to find valuable and meaningful information in it; formation of schoolchildren's need for reading practices, etc.

According to the results of the international assessment of reading quality by the Program for International Student Assessment (PISA), according to such parameters as attitude to reading, gender differences in reading, family reading,

the indicators of Ukrainian students are slightly lower than the average indicators of students of OECD countries (the average score of Ukrainian of students in reading (reading competence) – 466 points (in the leading country – 555, on average in OECD countries – 487); 70.7% of Ukrainian schoolchildren reached the second-fourth levels of the formation of reading competence (in OECD countries – 77%) , 25.9% of Ukrainian 15-year-old boys and girls do not have a basic reading level (23% in OECD countries), and only 3.4% have reached a high level – 5-6 level (in OECD countries – 9%) (Bondarenko, 2020; PISA, 2018).

The difference in reading performance of Ukrainian students compared to the average performance of schoolchildren from OECD countries is 23 points (PISA, 2018). Such a situation in educational circles of Ukraine causes lots of concern. Therefore, the experience of work involving children and youth in reading in Great Britain, the Federal Republic of Germany, Sweden, Italy, Finland, Austria, France, Poland, Belgium, Norway, the USA, Japan, Romania, Bulgaria and other countries where problems of reading and reading literacy are interpreted as a national and state priority. As we can see, the problem of the reading culture formation appears in the state dimension, it is one of the urgent problems of modern Ukrainian society, determined primarily by the fact that modern children and youth, as well as adults, do not read much, preferring other types of leisure activities.

In connection with the digitalization of education and social life, distance learning caused by the spread of COVID-infection, and now also the war in Ukraine, which was started by Russia on February 24, 2022, the main characteristics of children's reading are changing i.e. the status of reading, duration, nature, methods work with printed and electronic texts, children's and youth's reading circle, students' reading preferences, reading motivation, etc. The crisis of children's reading manifests itself not so much in the fact that schoolchildren stop reading, as in the fact that they have not developed interest in this field of study and the motivation to read disappears. And later, reading for teenagers and adolescents becomes more and more functional, pragmatic, utilitarian, and professional. Fiction is replaced by educational literature (this is at best, but at worst reading “for the soul” disappears from among the hobbies of youth. Teenagers are increasingly reading like adults: on the one hand, reading is the acquisition of information necessary for learning, on the other hand, it is “light reading” as entertainment (reading comics, illustrated magazines, books with simple and short texts, usually not of high artistic quality) (Alexander, 2005; Anderson, Wilson, & Fielding, 1988; Bilavych, Rozman, 2016; Chapman, & Tunmer, 1995; Conradi, Jang, & McKenna, 2014; Pfof, Dörfler, & Artelt, 2013; Fentsyk, & Larynova, 2017; Skoblikova, 2014; Yatsenko, 2008). Hence there is a problem of an active reader who will have a steady interest in reading and a high level of motivation throughout his life.

Our research (September 2021 – May 2022) in some schools of Ivano-Frankivsk and Ivano-Frankivsk region (10 schools) showed that only 28% of parents of 4th graders systematically read books out of 212 parents we interviewed: mothers prefer entertainment books, fathers enjoy reading sports and technical magazines. 7% of families have a tradition of daily reading aloud of favorite children's books. 46% of respondents were able to name their favorite book; the favorite book became the one that was read at home together with mom, dad, grandmother or grandfather. Favorite books include folk tales – 20%, literary tales – 10%, books by V. Nestaiko (36%), novels by R. Tolkien – 22%, series of books about Harry Potter – 21%, a book about Winnie the Pooh A. Milne (20%), books by R. Dahl (20%), etc. Fairy tales, fantasy, short stories were mentioned named by younger schoolchildren as their favorite genres of children's literature. Most 4th graders hardly read fiction outside the school curriculum. The choice of books for independent reading is influenced by teachers – 61%, parents – 34%; interesting literary reading lessons at school – 31%; advice from friends or classmates – 17%. The study showed that in those families where there are home libraries, children prefer reading. To the question “Where did you get the books to read?” respondents answered: from the home library – 28%, from the school library – 50%, bought books – 26%. A survey of fourth-graders showed that modern parents rarely buy books for their children (26% of the respondents), usually parents tend to buy e-books, audio-visual sources of information, which has a negative impact on the reading culture of the younger generation.

As already discussed above, “reading without coercion” is actively losing its popularity in the world, widespread consumption of “quick information” from social networks, accessible video content, as well as television is coming to the fore.

However, in many countries of the world, educational, political, and cultural elites make active attempts to counteract this, since reading plays an extremely important role for the development of any country. According to the report of the International Association of Publishers “Reading Matters: Surveys and Campaigns – how to keep and recover readers” (IPA, 2019), reading as a vital need, which is manifested in a stable number of readers or some signs of positive dynamics related to reading, is demonstrated only by certain countries with a long reading tradition and a high level of education (Canada, Poland, Germany, Great Britain, Denmark, Norway, Sweden, France, etc.) (International Publishers Association, 2019; *Lustro biblioteki*, 2021; IPA, 2019). We present the data published by the International Publishers Association (IPA), which reflect the reading practice of Ukrainians and representatives of other countries as of 2019 in fig. 1. As we can see, in terms of reading activity, Ukrainians (46% of people who read at least once a month) are significantly (by almost 20%) inferior to Canadians (67%), as well as others to representatives of European countries: French (60%), Icelanders (53%) (IPA, 2019).

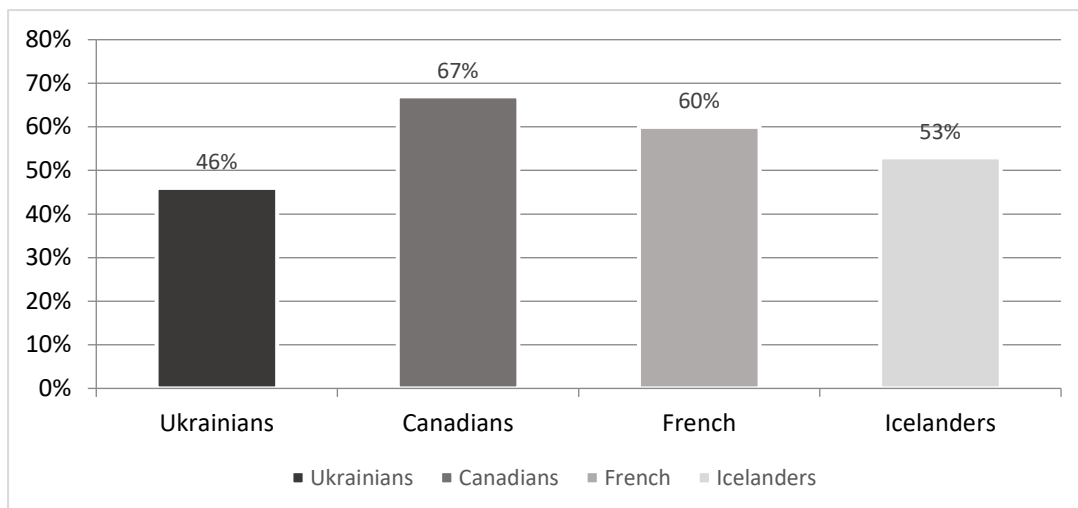


Figure 1 Reading practices (at least once a month) of Ukrainians, Canadians, French, Icelanders (%) (IPA, 2019)

According to the conclusion of the IPA, as of 2019, less than 0.5 books per capita were published in Ukraine (school textbooks, advertising and other publications not intended for free sale were not taken into account), and the following year, due to the spread of the COVID-2019 pandemic, this indicator decreased by half (to 0.25 books per capita). According to the data of national associations of publishers (International Publishers Association (IPA); Reading development strategy for 2021–2025 “Reading as a life strategy”; Report of the Kyiv International Institute of Sociology on reading in Ukraine), in the Republic of Poland this indicator is 2, 45, in the Czech Republic and the Slovak Republic – 3 books, in Turkey – 5 books, published per capita (Fig. 2). This factor has one of the determining influences on the reading activity of children and adults in Ukraine.

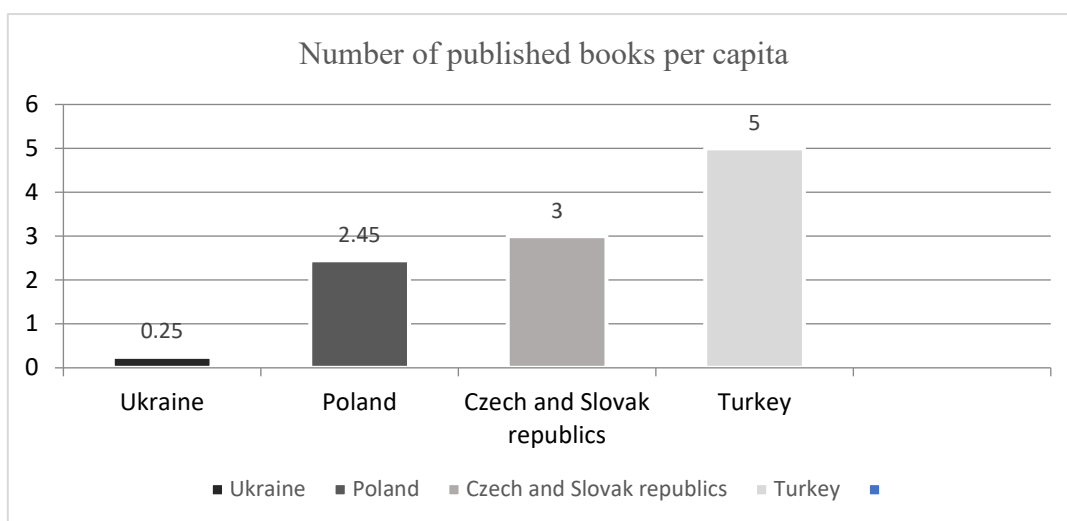


Figure 2 Book publications per capita in Ukraine, Poland, the Czech Republic, Slovakia, and Turkey as of 2020 (%) (IPA, 2019; MCIP, 2021; KMIS, 2020)

This fact (the publication of 0.25% of books per one resident of Ukraine) complicates the availability of book products on the book market and affects the formation of Ukrainians' interest in reading. In addition, taking into account the possibility of purchasing books in Ukraine, the index of provision of bookstores is still extremely low: as of 2018, there was one bookstore per 140,000 population, which is ten times lower than the average European indicators (in Germany, there is one store per 15,000 inhabitants, in Poland and Denmark – 1 bookstore per 12,000 inhabitants), as of 2019, there were 1,914 bookstores in Poland, and only about 300 in Ukraine (MCIP, 2021).

Ukraine is taking important steps on the way to stimulating the reading practices of citizens, a number of strategic documents aimed at the development of reading as a vital need among Ukrainians have been adopted e.g. Strategy for the development of library affairs for the period until 2025 “Qualitative changes in libraries to ensure the sustainable development of Ukraine” (2016), Strategy for the Popularization of the Ukrainian Language until 2030 “A Strong Language – a Successful State” (2019), Reading Development Strategy for 2021–2025 “Reading as a Life Strategy” (2021) (MCIP, 2021).

However, despite this, the rates of reading books by both youth and adults are falling, and the number of Ukrainian-language book products per capita is insufficient. According to the authoritative study “Reading in the context of media consumption and life design” (2020), the frequency of leisure time reading by Ukrainians has decreased compared to 2018 i.e. in 2018, 11% of Ukrainians claimed to read books every day, in 2020, only 8 % of readers (UIK, 2021).

Similar trends can be traced among the young readership. According to the data of the study “Reading in the context of media consumption and life design” (2020) (UIK, 2021), which was conducted by the Ukrainian Book Institute, which, among other things, is engaged in the promotion of reading in Ukraine, communication and games with friends are among the key leisure practices of children (59% spend free time with their friends every day); consumption of video content, namely: watching TV shows, movies, videos on YouTube (yes, in their free time every day, 44% of children watch TV, 35% watch videos from other sources, YouTube channels; for example, YouTube – 36% of regular users from the children's audience, Instagram – 27%, TikTok – 13%); every third respondent plays games (in particular, computer games), communicate in messengers, spend free time in nature; every fourth person is engaged in a hobby, every fifth person is engaged in sports. Only 13% of children read every day in their leisure time, 56% read at least several times a month, 11% of respondents read several times a year. 20% of children are a group of those who do not read for leisure (UIK, 2021). (See Fig. 3).

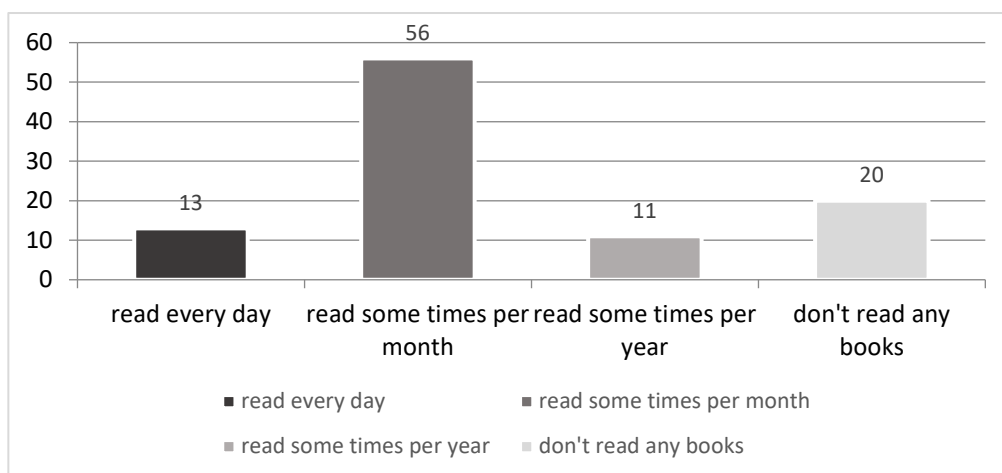


Figure 3 Reading activity of children (2020) (%) (UIK, 2021)

Under the conditions of the quarantine caused by the spread of the COVID-19 pandemic, the reading practices of children in 2020 changed somewhat: 23% of children-readers emphasized that they began to read more often, 16% of people noted that they began to read less often (UIK, 2021). Unfortunately, the increasing of spare time has not significantly affected the practices for reading in free time, which children usually devote to social networks.

The results of the survey related to the gender and age aspect are also important for our research. Among the adult population and children, the same trends are observed in the gender-age plane regarding the difference between students who read (readers) and students who do not read (non-readers): if among irregular and monthly readers, the distribution of students by gender is 50:50, then among readers (who read daily) it is 1:2 in favor of girls, among non-readers there are twice as many boys as girls (2:1). Fig. 4 shows the reading frequency of students depending on their age (UIK, 2021).

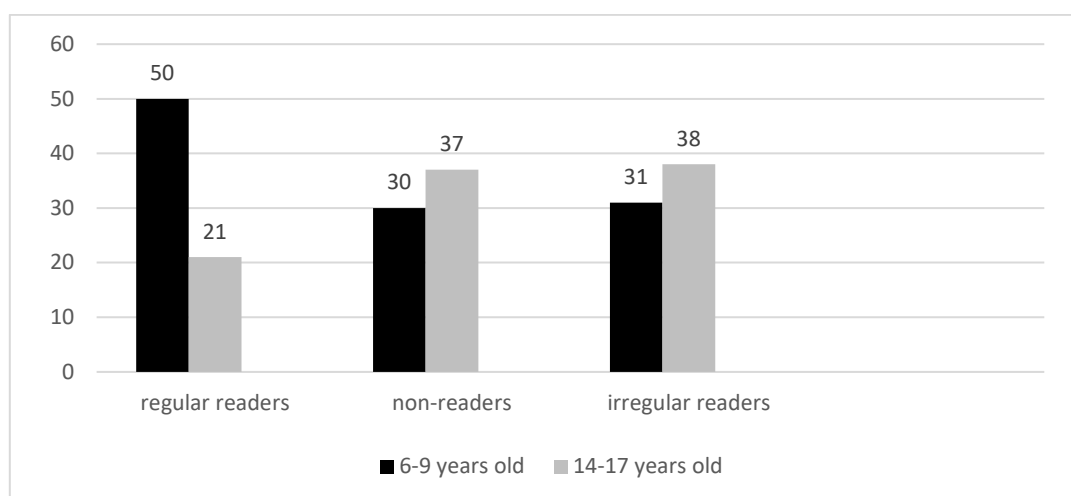


Figure 4 Reading frequency of students depending on age (2020) (%) (UIK, 2021)



As we can see (Fig. 4), the frequency of reading depends on age i.e. the younger the student, the more often he practices reading. 50% of junior high school students are readers who read every day. Among teenagers (14–17 years old), this indicator has halved as only 21% of students have a daily reading practice. The same trend persists among non-readers and irregular readers: 30% and 31% of junior high school students, respectively, against 37% and 38% of teenagers.

The majority of respondents claim that they do not like to read. 58% of students do so (48% of them are taught to read by their parents, 10% are not taught to read); among boys, the share of non-readers (those who do not like to read) is higher (66%) than among girls (48%); the statistics for book lovers are similar: 49% of girls and 33% of boys (KMIS, 2020; UIK, 2021). The answers of young respondents regarding the influence of the family environment, in particular parents, on engagement in reading are important. 74% of adults and 78% of students said that their parents tried or try to encourage them to read books. However, we distinguish the following trend: the younger the generation of schoolchildren, the more negative is the reaction of children to this training. 46% of adult respondents said that they liked the fact that their parents had taught them to read, and 28% of people did not like it. Only 30% of children like that their parents try to involve them in reading practices, 48% of the children interviewed do not like this situation (KMIS, 2020; UIK, 2021). There is a number of reasons for such resistance of the part of children, i.e. the idealization of parents' own efforts on the child to develop an interest in reading, the fact that children of generation Z have, like no other in the entire history of human development, the most alternatives reading, etc. This explains the fact that among the student audience, this indicator has increased by 2.5 times and reaches 57% (UIK, 2021).



*Figure 5 Motivating students to read (2020) (%) (UIK, 2021)*

Worthy of attention is the experience of work involving reading in Germany, Italy, Austria, France, Belgium, Norway, the USA, Japan, Romania, Bulgaria, Poland and other countries. According to the study of the reading activity of students in Great Britain (Statista, 2019), since 2005, the proportion of students who read daily compared to 2019 has decreased on average by 12% for girls and 13.2% for boys. There is a stable trend from 2005 to 2019 regarding the predominance of reading activity among girls compared to boys (this difference is from 8 to 10 percent). In 2019 among schoolchildren aged 8 to 18, 29.9 percent of girls and 21.8 percent of boys reported that they read daily (Statista, 2019). As of 2021, 41% of UK residents spend less than an hour a week reading or listening to books. 11% of people aged 18-34 admitted to reading more than 14 hours a week. 33% of people said they read more than in February 2020 (CartridgePeople, 2023). In order to achieve more effective results regarding the formation of a reading culture, daily compulsory reading classes have been introduced in UK schools; increased investment in school education; the principles of working with “difficult families”, “risk group” schoolchildren, and children with special needs have been radically changed, in particular in the area of the development of reading culture. As a result of the joint efforts of the British government with educational structures, the book community, mass media, public institutions and organizations, private companies managed to develop a comprehensive program of a large-scale company to popularize and involve the widest strata of the population of Great Britain in reading.

### **Conclusions**

Activation of reading practices of children and youth is possible under the influence of a purposeful system of pedagogical conditions, which are primarily an activity approach in teaching reading techniques (strategies); organization of pedagogical situations that stimulate students' reading activity; new directions in the joint work of the school, library, family, extracurricular activities. During the period of study, the learner must not only master various strategies of developmental, creative, intellectual, business reading, but also the reading of fiction (“leisure reading”, “reading for oneself”), which should form him as a reader. Consequently, the following tasks are suggested: teachers must master the current methods and technologies of working with artistic texts, provide assistance to students in mastering basic strategies that combine reading printed and screen texts, familiarize them with the reading circle, be an active book lover and promote reading from among by their own example students, involve parents in reading practices actively, cooperate with the school librarian and employees of local public libraries closely. Book culture created by mankind and the phenomenon of reading, as well as the traditions of book printing in Ukraine, the development of writing, the contribution of Ukrainian writers, teachers to the

development of national and world culture, etc. belong to the fundamental achievements of the human mind. Therefore, the special role of the Ukrainian book culture and its bearer, the Ukrainian reader, a person who reads, in the development of the Ukrainian state and civilization in general is undeniable. Reading and reading literacy (or the reading culture of an individual) are now highly valued and recognized by the world community.

The new paradigm of education requires mastering the concept of “reading culture”, by which we understand the active interest of students in reading and literature available to them in terms of content and form; knowledge of the circle of children's reading in its genre-thematic dimension; the ability to perform the necessary reading actions in working with a book and a work in order to form and develop the need for reading; availability of reading independence, productive ways of reading, high-quality reading skills, reading outlook. Education of a reading culture consists primarily of the habit of systematic daily reading. Nowadays, to encourage reading high-quality fiction among students, it is necessary to make much more effort than before. It is impossible to raise a full-fledged personality without a book as reading develops cognitive processes, personal general culture, forms knowledge, teaches thinking, helps a person understand his purpose, enriches the spiritual world. Reading practices form the qualities of a developed and socially valuable person in the education seekers. Reading, literacy, general cultural training, the ability to work with texts of various types are necessary conditions for successful education, and reading is the highest form of self-knowledge. According to such criteria, reading literacy is evaluated in the world at present (for example, PISA). In our opinion, solving these problems in Ukraine can be achieved under the following conditions: use of world experience in reading development and support; students' knowledge, in addition to the curriculum, of the works of modern children's writers, classic Ukrainian and foreign literature, works of national writers; updating the content and structure of extracurricular reading lessons through the study of modern children's bestsellers; implementation of a popular children's book in extracurricular work with schoolchildren; creation of a “reading environment” in the family-school-library system; in-depth knowledge of the work of popular children's writers by the teacher himself; etc. In the leading countries of the world, attraction to reading has become recognized as a nationwide social problem, the effective solution of which is possible only as a result of careful development of targeted policy priorities in the field of development of reading activities and raising the status of books in the social environment. Such a state strategy must be implemented in Ukraine as soon as possible.

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## MULTICULTURALISM AND INTERCULTURALISM: REALITY OR VISION IN TEACHING

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**Abstract.** *Today, the increasing mobility of people, globalisation and various political and economic circumstances have created a situation in which intercultural communication issues are more often on our minds. As shown on the Official Statistics website, of the 38708 long-term migrants who arrived in Latvia in 2022, only 5214 were ethnic Latvians, while 7758 were school-age children (Latvijas oficiālā statistika, 2023). The publication examines the experience of intercultural education in Latvia to date, keeping in mind that not only in Latvia, but also globally, there are different opinions on how much attention should be paid on intercultural education issues in schools. The aim of this publication is to analyse the readiness of general education teachers of Latvia to work in multicultural classrooms using the teaching methods, which require a pedagogical approach based on a tolerant attitude towards ethnic, cultural and religious differences between the people. The main research question: how much teachers in comprehensive schools are aware of intercultural education issues and willing to use intercultural education methods in their work. The study is based on the results of a survey of teachers working in grades 1-12 in general education schools. The research results lead to the conclusion that teachers' awareness on intercultural issues is not sufficient.*

**Keywords:** *intercultural education, interculturalism, globalisation, multiculturalism, students, teaching process*

### Introduction

In today's world, which is constantly undergoing rapid changes not only in politics, but also due to economic instability and changes in social structures and cultural patterns, education is the key to a peaceful and respectful coexistence. Intercultural education, which includes awareness of one's own culture, traditions and values, as well as knowledge of other peoples' cultures and traditions and the ability to live in a multicultural society, plays an important role in understanding and accepting the differences and respecting the needs and values of others.

Different ethnic, social and religious groups have always been part of any society. Inclusive education issues related to intercultural communication in a multicultural society are becoming more and more topical to Latvian society. The number of pupils that have previously been educated in different educational institutions abroad is increasing in Latvian educational institutions. As can be seen

from the official statistics website, of the 38,708 long-term migrants who arrived in Latvia in 2022, only 5,214 were ethnic Latvians, while 7,758 were school-age children (Latvijas oficiālā statistika, 2023). Along with developing the conceptual understanding and language practice, these children need to adapt to a new country, a new learning system, a new language and culture (Schmida & Chu, 2016). The successful implementation of these processes lies in teachers' hands; therefore, the personality of the teacher is decisive. An "inspiring and informed teacher" is the bearer of important ideas for modern society (Jan, 2017).

The aim of the article is to analyse the current situation in Latvian comprehensive schools with the Latvian language of instruction, as well as challenges and perspectives in teacher's work in relation to the issues of intercultural education in today's multicultural society.

For this purpose, the following research questions are put forward:

1. What is the context for teaching intercultural education in Latvian schools?
2. To what extent are the teachers in Latvian schools informed and aware of intercultural education issues?
3. What challenges and perspectives do educators see when introducing intercultural communication approaches to the multicultural environment of a contemporary classroom?

## **Literature Review**

Modern society is characterized by many complex processes of interaction: socialization, radicalization, globalization, multiculturalism, and many others. Everyone has one's own ethnicity, culture, religion. It shapes a person as a social being, shapes person's worldviews, behaviour, values, thinking, lifestyle (Margeviča, 2008). Changes in education have been promoted both by external environmental factors, such as the free market, the need to communicate with foreign cooperation partners, as well as internal environmental factors, such as changes in learning approaches and methods (Samusēviča, Iliško, & Rimšāne, 2010).

In Latvia, several concepts are used to define these interaction processes and factors. There are discussions on multiculturalism, interculturalism, intercultural communication. Multicultural and intercultural education are often used as synonyms, although worldwide scientific research indicates that there is a significant difference between these concepts (Holm, Zilliacus, 2009).

Looking from a geographic perspective, in Europe the concept of intercultural education is employed, while in the United States, Canada, Australia and Asia the preference is given to the concept of multicultural education (Hill, 2007; Leeman & Reid, 2006).

Multiculturalism has traditionally been identified as a way of describing diversity, specifically differences between populations in terms of racial, ethnic, religious, geographical, linguistic and cultural differences, in other words, as the recognition of diversity (Clayton, 2020). The main goal of multicultural education is that pupils and students from different social classes, races and ethnic groups, as well as different gender affiliations, receive equal educational opportunities (Banks, 2013). In reality, multicultural education is often described as a rather static process in which people with different backgrounds are in physical proximity, but not in interaction (Holm, Zilliacus, 2009). Therefore, the development of educational standards and programmes is often based on traditional, fundamental content, supplemented by information on multiculturalism issues, which Banks (2013) sarcastically calls "festival, food and dance approach".

The term "interculturalism" is used to refer to interactions and interrelationships between different cultural groups in a culturally diverse and changing environment (Hill, 2007). The concept of intercultural education appeared in Europe as early as 1983, when a resolution of conference in Berlin on the education of migrant children in schools emphasized the intercultural dimension. Observing the failure of integration and the lower level of education of minority pupils in comparison to local pupils, one of the tasks of intercultural education was to promote intercultural dialogue, that is, dialogue that is "open and respectful" and that takes place between individuals or groups "with different ethnic, cultural, religious and linguistic backgrounds and heritage, based on mutual understanding and respect" (Council of Europe, 2008).

Already at the end of the 20th century, the phases of intercultural learning were summarized, and the purposeful acquisition of them in the learning and upbringing process helped to promote intercultural communication. Firstly, they include the ability to see the general relationship between human behaviour and culture, then to identify the standards of one's own culture and evaluate them in perspective to another culture, which allows to flexibly perceive cultural interrelationships and build constructive relations with members of another culture (Samusēviča, Ilisko & Rimšāne, 2010).

However, there is still a wide range of opportunities for intercultural learning, and the reality for teaching and learning can vary greatly from country to country. In Latvia, and also in other Eastern European countries, which have relatively recently regained their independence, the topical issue is ethnolinguistic vitality and preservation of national language. Thus, the preservation and spread of the Latvian language as an official state language has become crucial, because often the transition to politically and economically dominant languages is an inevitable companion to globalization and integration (Baltiņš, Druviete, 2017).

Nowadays, a good teacher is not characterized by good academic knowledge. Teacher must also have the ability to use his/her knowledge, personal, social and



methodological abilities in order to understand the basic principles and approaches of learning in the intercultural context. According to Guillén-Yiparrea and Ramírez-Montoya (2023), there are three competencies that are crucial for intercultural collaboration: intercultural communication, intercultural sensitivity and intercultural responsibility. This requires both professional and personal development. Intercultural education encourages teachers to critically evaluate their own culture, history, attitudes and values in the context of other cultures and build competence of “sensitivity or intercultural sensitivity” (Hammer et al., 2003).

## **Methodology**

In order to achieve the aim of this study, the survey method using Google survey platform was chosen as "surveys collect data at a specific point in time with the aim of describing the nature of the existing circumstances" (Cohen, Manion, Morrison, 2006, 169).

The research base consists of educators working in general education schools in Latvia. The survey uses both structured and open-ended questions, which allow for an in-depth and detailed study of how well school educators are aware of intercultural issues and how much multiculturalism and intercultural approaches are used in their work, exploring the challenges for the work in intercultural classrooms.

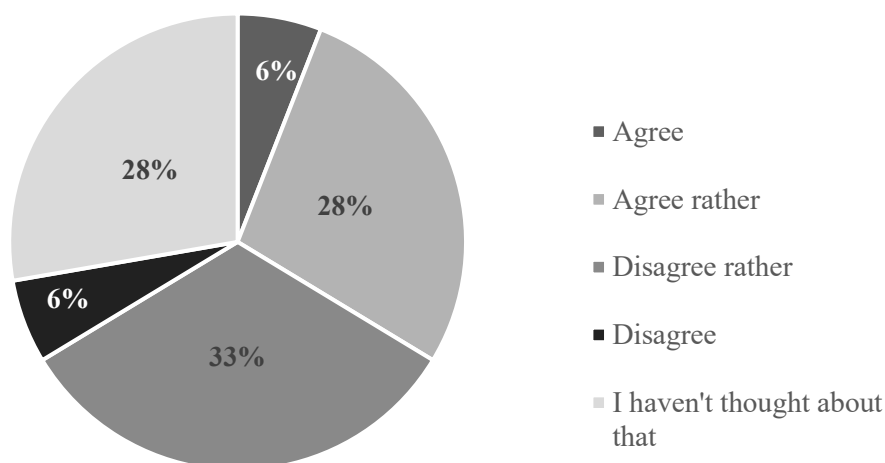
The survey was organized in general education institutions in December, 2023 to January 2024. From 89 questionnaires that were distributed, only 37 respondents submitted their responses, which indirectly suggests, that there is not sufficient understanding and interest in intercultural education issues in Latvian schools. The survey allows making assumptions on the reasons for such attitudes.

## **Results**

In a democratic society, the state ensures equal education for all, and the school curriculum is often based on the system of values that includes national language and cultural values. Changes in today's educational environment require an innovative approach from the teacher, focussing on implementation of inclusive education principles and on the development of communication skills and intercultural competences. The teacher must be open to change and to other cultures, as well as teach the students to understand and value cultural differences, understand their worldviews, as well as actively support democratic values.

Analysis of the data reveals that 35% of the teachers surveyed are aware of different ethnicities of their students. Most educators believe that when working in a school, the teacher should be knowledgeable on issues of multiculturalism and intercultural communication (91% of those surveyed). However, teachers'

knowledge about the principles and methods of intercultural communication is less optimistic. Only 5.4% of respondents state that they are knowledgeable and well-informed about intercultural communication; a higher proportion (29.7%) of teachers admit that they are aware of this concept, but do not know anything specific about it, but 59.5% of teachers say that they approximately know what this concept implies. A similar attitude is also observed in the answers to the question about the use of intercultural education methods in teachers' daily activities.



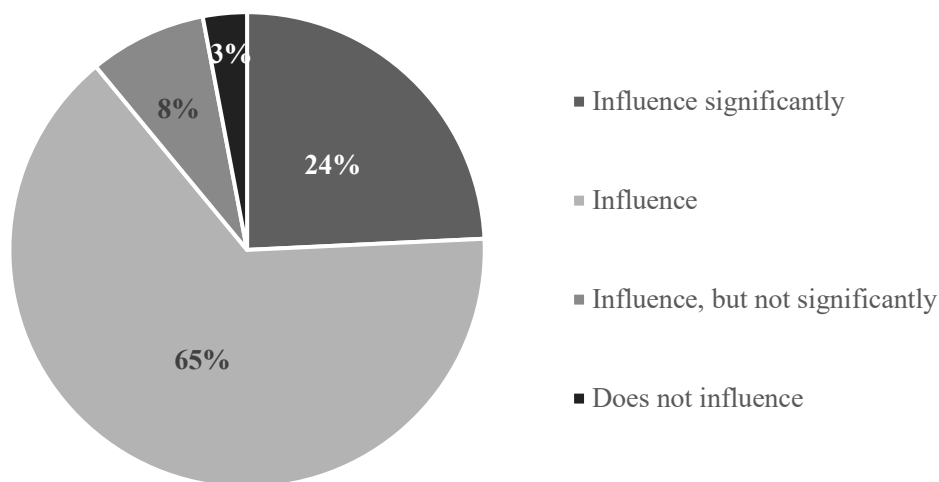
*Figure 1 The use of intercultural education methods in daily work of teachers (made by authors)*

When choosing methods and techniques for work in an ethnically diverse classroom, teachers point out that intercultural education is an education that prepares children for life in a multi-racial and multi-national society, where cultures are in mutual interaction and where previous experience of learners should be taken into account, especially if the child has recently entered the Latvian education system. When working in such a classroom, the teacher must be ready to change his or her previous views and attitudes, if necessary work methods, even the school environment, in order to ensure equal educational opportunities for all students.

As the most productive activities that promote intercultural dialogue, educators recognize special national cultural days (78%) and joint celebrations (73%), participation in international projects (73%), cultural heritage master classes such as folk dance and play evenings, cooking master classes, meetings with masters of folk crafts (70%). The Living Library method is also suggested with the participation of cultural carriers or biographical self-reflections of students and teachers themselves, because in this way the perception of 'the other' is formed, the pupils' horizon and the understanding of surrounding events is expanded. Educators associate the use of intercultural communication methods

with issues of tolerance, as well as improvement of language skills. At the same time, it is also a challenge to preserve one's own and pupils' national identity, so that there is no unmotivated acculturation or assimilation that could cause tensions not only in the school environment, but also in society.

As the researchers point out (Laķis, 2000), in today's multicultural society, tensions and conflicts are not only possible, but they must be addressed in an open and constructive way. In their responses, respondents point to the important role of the teacher in maintaining ethnic harmony and intercultural dialogue in classrooms with heterogeneity in the ethnic composition of students.



*Figure 2 The impact of the teacher's work in promoting ethnic harmony and intercultural dialogue in classes with a heterogeneous ethnic composition (made by authors)*

The respondents (70%) see the language barrier as a main challenge and obstacle to the implementation of intercultural education in Latvia, especially it became relevant after the Russian invasion of Ukraine in 2022, when many Ukrainian children entered the Latvian educational environment. This was confirmed by the research conducted by the author in December 2022 in general education schools with the Latvian language of instruction, when 39 out of 42 survey participants – pedagogues indicated the language barrier as the most significant obstacle to the successful integration of pupils-newcomers in schools with the Latvian language of instruction (Birzniece, 2023).

Another important factor that affects successful intercultural communication not only in society, but also in the classroom, are stereotypes and perception differences (acknowledged by 51% of respondents), but 39% of respondents point to psychological barriers in the intercultural context. In turn, 15 educators' express doubts about their competency when teaching in intercultural environment. Meanwhile, fears about the political context have only been noted by 7 educators (18%), which shows belief in the fundamental values of the country and political sustainability.

The basis of intercultural competence is knowledge of the traditions and basic models of one’s own culture and of the principles that form cultural identities of others. The teachers emphasize significant advantages that the use of intercultural education approaches provides for the learning process.

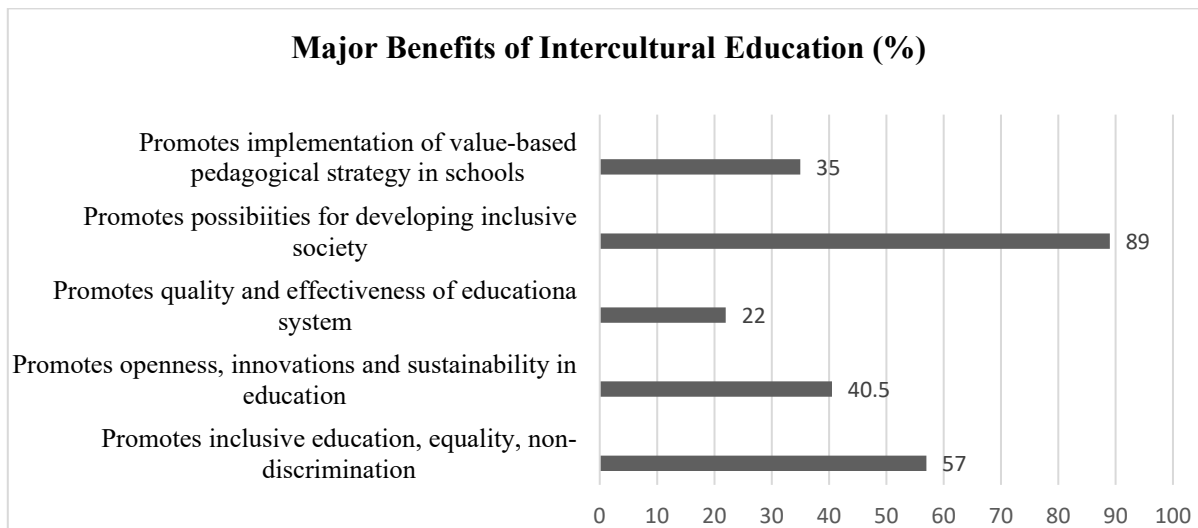


Figure 3 The major benefits of intercultural education (made by authors)

Most teachers have expressed the desire to improve their skills for working in an ethnically heterogeneous environment – multicultural classroom. 32 of surveyed teachers indicate that they would be happy to participate in professional development courses devoted to understanding of multiculturalism and intercultural education.

### Conclusions

The globalization processes of today's world are felt increasingly also in the school environment. The goal of contemporary education is to help the learners to acquire a balanced set of skills that will be needed in real life, which includes the understanding of the generally accepted values in society, such as spirituality, virtues, respectful and tolerant relationships between people valuing each other’s traditions and culture. To successfully implement these learning outcomes, the educator’s intercultural intelligence is crucial, as well as a supportive learning environment that ensures this achievement.

Nowadays, it is not enough for a teacher to just be a good expert in his/her field. According to Tūna (2016), educators should be knowledgeable and creative professionals who regularly reflect on their activities and adapt them to the needs of children, take responsibility for their decisions, strengthen the sense of belonging and community, and promote social harmony and solidarity in an ethnically heterogeneous environment. Researchers believe that people who

speak more than one language and know more than one culture are more empathetic. The good intercultural education brings a change of attitudes, which includes ability to respect, openness towards the different, development of non-stereotypical attitudes, ethno-relative thinking, curiosity, virtues of tolerance and empathy.

This study confirms the teachers' awareness about the ethnically diverse classrooms they work in, but not always they are practically ready to integrate intercultural education approach in their daily work. They are more willing to point out the shortcomings than to evaluate the long-term contributions. This study revealed the insufficient knowledge of teachers about the methodology for work in culturally diverse classrooms, expressing the desire to improve their intercultural communication in professional development courses. On national level, some professional development courses are offered in the form of campaigns, for example, courses on intercultural education organized by Education Development Centre. But it is not enough. The development of intercultural competence should be seriously promoted during the teacher education process, providing the steady foundation for work in multicultural classrooms and multicultural society.

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## INDIVIDUALISATION OF STUDENTS' LEARNING IN GRADES 5-8: EXPERIENCES OF TEACHERS

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**Abstract.** *The article analyses the experiences of teachers in general education schools in the field of individualisation of students' learning in grades 5–8. It theoretically discusses individualised learning strategies based on the guidelines of universal design for learning approach and teachers' abilities in selecting approaches to individualise students' learning. The implementation of individualised learning requires an increasing amount of theoretical and practical preparation of teachers in order to facilitate students' individualised learning. Teachers, therefore, need to explore innovative strategies and approaches to meet the broad and ever-changing learning needs of their students, to diversify their methods and to create dynamic learning experiences for their students. The analysis of the qualitative research findings has revealed that: teachers' experiences of individualising students' learning are varied, conditioned by the ability to know the personal characteristics and abilities of the student; teachers' experience of individualising teaching is characterised by a collaborative approach to dialogue and reflection; teachers' insights into the strengths and weaknesses of their ability to individualise students' learning; and teachers' insights into practical experiences of using the methods of individualisation.*

**Keywords:** *general education teacher, learning methods, individualised learning, teachers' experiences.*

### Introduction

In the 21st century, every school-age student is expected to be able to read critically, write with reasoning and logic, evaluate themselves and choose a career path. To this purpose, a strong emphasis is placed on individualising learning to adapt it to different characteristics and needs of students. Customisation of teaching to the needs of students has highlighted the characteristics of the individualised approach to the student (Helmke, 2012). Individualisation is not only based on the pupil's individual cognition, but also includes the content,

methods and techniques of teaching, i.e., the whole framework of the teaching and learning process (Šiaučiukėnienė et al., 2013). There are various scientific definitions of individualised learning. However, according to Hughey (2020), it is most often associated with a student-centered approach, student agency, flexible learning, demonstrated mastery of competencies, and a holistic perspective to the whole child. According to this author, Gardner's Theory of Multiple Intelligences and Self-Determination Theory, as well as the humanistic approach, represent a framework of human motivation and personality and are based on the psychological needs of autonomy, competence, and relatedness. All of these are connected to the instructional approach to effectively facilitate individualised learning. A combination of all this provides an additional perspective of including data-informed decision making to create a personal development layer with a personal vision and assessment (Hughey, 2020).

Individualisation of learning remains relevant because it addresses the different capabilities, goals, preferences, interests, etc., of learners, where learning activities, instructions, guidance are linked to individual needs and encourage active engagement in learning activities and content development (Kurilov, 2018; Giota et al., 2019). The relevance of individualised learning is enhanced by the characteristics of the modern generation of students, which is characterised by individualism, creativity, activity, the ability to perform several tasks or actions at the same time, the difficulty of concentrating, the desire to obtain a quick result, the rejection of authority, innovativeness and other features (Kvieskienė & Kvieska, 2018). Individualisation of learning, as it is points out in the framework and guidelines of UNESCO (2020), includes several key aspects of effective learning: shared responsibility for learning between the student and the teacher; knowledge of the student's personality; engaging the student in the process by linking learning to experiences and aspirations, ensuring motivation to acquire new knowledge and skills; a collaborative culture based on participation and engagement in the learning process; and the effective use of information technology to provide an individualised learning infrastructure and appropriate learning resources. Individualised learning can occur in a variety of settings and formats. Technology has provided greater opportunities and mediums for meeting learner needs. The ability to individualise learning with flexible environments has been a game changer for education. Hughey (2020) states that the synthesis and development of information technology eliminates the barriers preventing the sharing of information and knowledge, as well as the learning boundary.

Individualised learning encourages students to take responsibility for their own learning and achievements, orienting the education system towards the learner, changing their role from consumer to collaborative partner and creating a unique learning pathway (Kvieskienė & Kvieska, 2018). The learner and the teacher are encouraged to work more closely together, with an emphasis on learner autonomy and engagement in deep learning, which contributes to



individual learning experiences and better learning outcomes (Monkevičienė et al., 2014). Facilitating individualised learning requires more flexibility from educational institutions, moving from education for all to education for everyone, i.e. individualised learning. Educators, therefore, need to explore innovative strategies and approaches to meet the diverse and ever-changing needs of learners and create dynamic learning experiences (Oddone et al., 2019). An experienced teacher with appropriate and deep competences is able to mobilise learners to work, even if they are very different in terms of experience, motivation, inclinations, interests, aspirations, abilities, level of achievement, etc., which results in different learning needs (Kondratavičienė, 2018). According to Radović et al. (2021), individualisation of learning as a didactic principle is considered in the context of the requirement that all students should be given optimal educational opportunities according to their individual abilities. The didactic system of individualised teaching is defined as a type of didactic organisation in which teachers' educational work is adapted to the individual abilities, aptitudes and interests of students.

Although individualised learning is a progressive process, there are also challenges: students do not always know what they do not know—they need to know the next steps in their learning in order to create an individualised pathway, and the teacher's role and functions should not be underestimated; the teacher needs to be able and willing not only to teach, but also to support learning, which requires knowing the students, their personal characteristics, and their individual learning styles and techniques (Deakin Crick et al, 2013; Oddone et al., 2019). The scientific literature identifies the problems of individualised learning and the reasons behind them: inappropriate teaching methods and a lack of didactic and motivational competences of the teacher (Biggs et al., 2011; Olsen, 2011; Bray & McClaskey, 2012; Felder & Brent, 2015, etc.); failure to identify students' individual characteristics, learning styles, and approaches and to select appropriate methods (Deborah et al, 2014; Hendry et al., 2015, etc.); lack of knowledge of the essence of individualised learning, its technologies and benefits (Campbell et al., 2007; Kondratavičienė, 2018, etc.); inappropriate learning methods, tools, lack of attention to independent work (Mayer, 2017; Giota et al., 2019, etc.); and other.

The research-based assessment of the problems and facilitators of individualised learning suggests that this learning can help to overcome learning difficulties of students related to the choice and application of learning methods, the implementation of more varied, targeted and effective learning activities, and the development of teachers' competences. Therefore, the desire to find out the importance, opportunities and difficulties of individualising learning, the methods used by teachers to meet the needs of students, and the importance of teachers' preparation and qualities has led to the *research problem*: what are the

experiences of teachers in facilitating the individualisation of the learning of students in grades 5–8?

**The aim of the study** is to analyse teachers' experiences of individualisation of students learning in grades 5–8.

**Research methods:** theoretical analysis, document analysis, qualitative research (interview), content analysis.

## **Methodology**

In order to reveal teachers' experiences of facilitating the individualisation of students' learning in grades 5-8 a qualitative research strategy has been chosen, which allows for a detailed analysis of people's experiences. "Qualitative research helps the researcher to better understand the human condition and human behaviour in different contexts and situations" (Bengtsson, 2016, p. 8). The theories of pragmatic and humanistic learning (Bitinas, 2013) were used as a basis for the study. These were applied to provide an interpretative, holistic view of the problem under analysis, the experience of the research participants, and the explanations that emerged from the situational analysis. The study was carried out by using a semi-structured interview method. The interviews aim to understand the phenomenon "from the inside", i.e., from the perspective of the research participant (Gaižauskaitė et al., 2016). In line with the aim of the study, the interview questions were designed to elicit teachers' experiences of facilitating the individualisation of students' learning in grades 5–8.

The interviews were conducted between September and November 2023. The data collection was based on purposive, criterion sampling. The main criterion was teachers' experience in facilitating individualised learning of students in grades 5–8. Teachers from different general education institutions in the country agreed to take part in the study: 9 of them were women and 2 men (N=11); the average age of participants was 43 years; average professional experience was 16 years. The research is based on the following principles: respect for the individual's free decision to participate in the research; information about the research; introduction to the purpose of the research, the method of data collection and the procedure of the research; goodwill and a willingness to do no harm to the subject; confidentiality and anonymity (Wiles, 2012). All participants took part voluntarily and freely; they were informed about the purpose of the research, the process, their rights to stop the interview at any time, not to answer questions they did not want to answer, to control the amount of information they wanted to share, etc. Participants were reassured that the information obtained during the study would only be used for the purposes of the researchers and the study. The participants' statements have been transcribed and included in the overall text of the interviews, so their identities cannot be decoded. The timing of the interview was agreed with each participant. The interviews lasted

approximately 60 minutes in direct contact with the participant. The interview was recorded with the consent of the participant.

Analysis of the qualitative research data. The data were analysed by using a qualitative content analysis. The analysis of qualitative data was carried out in several stages: 1) preparation of the data collected during the interviews for analysis by grouping them into separate groups; 2) selection of the unit of analysis by selecting a phrase as the unit of analysis, which reveals the attitude of the participant to a particular issue; 3) creation of subcategories and coding scheme; 4) summarisation of coded material by presenting the content of the coded texts in tables. The data were analysed by four researchers. The analysis of the units of meaning led to the creation of subcategories, which were obtained by heuristic means: reading the text and abstracting the information expressed. The subcategories were then grouped into a series of categories. Based on the keywords, 4 main categories were identified: the definition of individualisation of students' learning; teachers' ability to recognise students' personal characteristics and their abilities; the strengths and weaknesses of teachers' ability to facilitate individualised learning; and practical insights from teachers' experiences of selecting and applying individualised learning methods.

### **Research results**

The analysis of the data focused on different views of participants, which were based on their practical experiences of individualising teaching for students in grades 5–8. It was relevant to find out how teachers understand the individualisation Facilitation of the students' learning in educational activities and what interpretations of the definition of individualisation they give on the basis of their pedagogical experience. Although all participants of the study acknowledged that individualisation is an important factor for the success of every student's education, in actual practice, individualisation of students' learning is understood differently. Table 1 presents the participants' definitions of individualisation of students' learning.

The participants' reflections (Table 1) show that they understand the essence of facilitating the individualisation of students' learning, but that they interpret the concept in terms of their own personal experience in this area. The results of the survey showed that participants tend to break down the definition of individualisation of students' learning into different parts. This indicates that the experiences of the research participants are diverse in this area and do not provide a complete picture of individualisation of learning.

**Table 1 Teachers' definitions of individualisation of students' learning**  
(compiled by authors)

Category	Subcategory	Confirmatory statements
Definition of individualisation of students' learning	Getting to know the student's personality	"<...> taking into account the individual abilities of each student, thus creating the right conditions for learning, developing various abilities <...> - this, I believe, is the essence of individualised education" (P4); "<...> Taking into account the student's needs, personal qualities, abilities in the delivery of the educational content <...>" (P8); "<...> Taking into account the student's experience, knowledge, abilities <...> when organising the educational process" (P10).
	Student involvement in learning	"<...> I allow the student to initiate their own learning because it produces results <...>" (P11); "<...> Together with the student, you can not only achieve the objectives of the general education curriculum, the acquisition of competences, but also the development of personal qualities and cognition <...>" (P2); "<...> When you make the teaching student-centred, the student not only achieves the goals of the learning <...>" (P5).
	Integrating special needs of students	"Individualised education is for children with special educational needs <...> so that they can learn together with other students" (P1); "There is a need for individualised curricula for students with special needs in order to educate, integrate <...> them" (P6).

To implement individualised learning, there are obviously a number of challenges for the teacher: with limited time resources, the teacher must know each student, their strengths, weaknesses, needs, interests, be able to design the curriculum in such a way that the student is able to learn according to their own needs and abilities, and be able to properly organise and assess their own independent learning (Oddone et al., 2019). During the study, participants highlighted the importance of knowing students' personal characteristics, abilities, needs, and learning styles as helping them to individualise their learning more effectively. Participants stated that "<...> If you take into account the needs, abilities, and experiences of a student, they have fewer learning difficulties and failures <...>" (P3); "<...> Knowing the personal characteristics and abilities of a student enhances their motivation to learn, and promotes their academic performance and fairness <...>" (P8); "<...> If you know your student, if you know their learning styles, you can make their learning more successful <...>" (P4); "When I know my students' learning needs, I can understand my students, build on their strengths, reduce their weaknesses, and help them to learn more successfully <...>" (P6). However, although the participants stated that they are trying to get to know all the students, their personal characteristics, abilities, and

needs, even though in the classroom there are “<...> ... students with different abilities, needs, so it is difficult to take into account all of them <...>” (P4), they are not always able to do this in the educational process. It was, therefore, relevant to find out what challenges the participants face (Table 2).

Table 2 *Teachers’ challenges in getting to know their students (compiled by authors)*

Category	Subcategory	Confirmatory statements
Getting to know students	Lack of time and resources	“<...>I am always trying to find out about the abilities of all the students, their personal qualities, <...> there are so many students, the content is broad, I don’t have enough time to do this <...>” (P2); “I am trying to at least pay attention to those students who have learning difficulties <. ..>, to find out how to individualise their learning so that it is effective, but I don’t always succeed” (P7); “How to find time to give equal attention to all, to choose teaching methods according to their abilities, learning needs <. ...>” (P11); “<...> When there is a lack of time and I need to introduce important theory, but <...> my students don’t like such lessons <...>” (P6); “When you are trying to find out students’ learning needs, you run out of time, and you don’t always find the right tasks and tests <...>” (P9).
	Teacher’s workload	“How to manage to get to know each student’s needs and learning difficulties, when the pace is so fast, when there is so much to give to and to share with students <...>” (P5); “<...> next time you are just giving a general lesson to everybody, you don’t make sure you’ve chosen the right methods of teaching and learning, or the right ones to fit the class, because you don’t have the time to get to know everybody well <...>” (P10); “<...> When the goal is to impart knowledge, but not to develop skills <...>” (P8).

The findings of the study showed that a comprehensive understanding of the student, their personal qualities, abilities, and learning needs, according to the participants, is limited by their excessive workload, lack of time and resources. The experiences of these participants revealed a lack of teachers’ competence in individualising learning in practice. However, they tended to attribute their lack of competence to problems of organising the educational process, the content, and the excessive demands placed on the teacher.

The teacher needs to be able to use a variety of innovative learning methods to ensure that every student is able to learn at different levels and content, and to be able to help the student to achieve the goal, to discover a passion for acquiring new knowledge and skills, but also to think critically, build relationships, and so on (Felder & Brent, 2015, etc.). In this research, we aimed to find out what skills a teacher should develop and improve to successfully individualise students’ learning (Table 3).

**Table 3 Teachers' existing and developed skills in individualising students' learning**  
(compiled by authors)

Category	Subcategory	Confirmatory statements
Teachers' capacity to individualise students' learning	Adapting teaching content to the learner	“<...> Getting to know the student, adapting the teaching content to the learner, <...> finding a common ground with the student and with their learning <...>, this is the teacher's most important ability to do a good job” (P8); “<...> enriching the teaching content with subjects that are relevant to the student <...>” (P9); “<...> To be flexible, to be able to orient the teaching content of the to the individual needs and abilities of the students <...>” (P4); “<...> You take everything into account, first of all, the child, and then you put the teaching content in the way that it should be put together. You look at the child, you know the children quite well, you know what they are capable of and how much they are capable of, and then I adapt and individualise their learning according to that” (P11).
	Student motivation, responsibility for learning	“<...> I give tasks that encourage the student to think, to do them themselves <...>” (P9); “<...> ... To teach independence <...> that motivates success” (P1); “You choose learning materials, methods that liberate the learner the most to reinforce learning, encourage the use of strengths and the improvement of weaknesses...” (P6); “<...> I adapt for each student so that they can look at their own progress <...>” (P2); “I adapt tasks so that students not only succeed but also want to <...>” (P4).
	Appropriate teaching methods, strategies	“One of the ways of selecting teaching methods is by getting to know the class <...>” (P4); “<...> I choose different methods to achieve the most effective level of learning and development in the class <...>” (P11); “<...> I always think about whether the methods will help to engage the whole class <...>” (P9); “<...> There is a wide variety of methods to choose from for individualisation; the most important thing is to choose the right ones <...>” (P6); “<...> Finding out what the students' needs are helps to select the methods <...>” (P2).
	Relationships based on trust	“An atmosphere of trust in each other is not only about getting to know the student, but also about helping them to learn <...>” (P3); “Positive emotions create a trusting relationship <...>, and are important for the individualisation of learning” (P9); “Nothing saves the day in a communication situation like a smiling teacher who is always calm and always speaking calmly <...>, only this doesn't always work (P4).

The findings of the research show that teachers are responsible for the success of every student's learning and need to continuously improve their existing and new skills in facilitating the individualisation of the learning of students. For the participants, the success of the student's learning is very important, which implies the teacher's ability to select the right content and teaching methods. Research (Kurilov, 2018) has shown that individualisation is the most important factor for successful learning, and it determines learners' motivation, commitment, learning attitudes, etc. The learner becomes the most important participant in education, and the teacher's role and functions change during the educational process.

The teacher is no longer the sole and infallible holder and disseminator of information, but the student's helper, selecting from the wealth of information what is reliable, relevant, valuable and interesting to each individual student. This is illustrated by the following participants' statements: "<...> *The teacher plays the role of a consultant, a helper <...>*" (P2); "<...> *I help the student to better absorb new material, to use it <...>*" (P8); "<...> *I encourage the student to think, to do it by himself <...>*" (P9); "<...> *I help the student understand how he learns best <...>*" (P4). This shows that participants are aware of their new role and function in the learning process. Scientific literature (Deakin Crick et al., 2013; Oddone et al., 2019) has highlighted that student diversity allows teachers to choose a wide range of teaching and learning methods, tools and activities in the classroom, to make them interesting and engaging, which helps students to experience learning success, to avoid severe learning difficulties and to enhance motivation to learn. This study reveals that it is essential for the individualisation of each student's learning that the teachers were able to use didactic and learning methods and tools to ensure the success of students' learning. The participants identified the following didactic and learning methods and tools: brainstorming, explanation, concept map, problem solving, jigsaw, problem solving by using the method of trial and error, case studies, puzzles, competitions, skits, self-assessment and individual questionnaires, games, independent work, project activities, etc.

However, the study notes that not all teaching methods help students to learn successfully. Students do not just have to reproduce and memorize the teacher's information, the textbook, the formulae, without making any effort to understand the learning material, but they have to focus on the meaning of learning, i.e., to understand the given learning material, to investigate, to compare, to express their own opinions, to argue, etc. (Felder et al., 2005). The study found that the participants are aware that different approaches need to be used according to the predominant areas of students' learning abilities. They say: "<...> *learning methods should be used to encourage students to go deeper into the material, to understand the limits of their own knowledge and experience, to think, to learn to express themselves, to share their knowledge with others <...>, which helps to get*

them to apply all of this to their individual learning” (P6). Teachers identify only certain teaching methods that help to individualise students' learning according to their levels of knowledge, understanding, thinking, ability to work together, etc. (Table 4).

**Table 4 Teachers' identification of teaching methods to individualise students' learning according to their different learning levels (compiled by authors)**

Category	Subcategory	Confirmatory statements
Learning to understand the meaning of objects, phenomena, concepts, etc.	Mind Map	“<...> I use methods where the information is conveyed through visuals, such as “Mind Map” (P10); “Drawing a “mind map” allows students to understand the interrelationships and interdependence of objects and phenomena <...> it allows knowledge to be absorbed visually <...>” (P2).
	Concept Map	“<...> I encourage students to draw diagrams themselves to remember the information <...>” (P11); “<...> I often use visual representations of information: graphs, charts, tables, maps <...>” (P3).
Learning how to express ideas, opinions, debate, argue, think, etc.	Interview	“<...> I make use of their well-developed auditory memory by using different verbal methods such as interviews <. ...>” (P4); “<...> Teaches students to present their ideas, answer questions <...>” (P5); „<...> It helps to clarify needs and develop communication skills <...>“ (P9).
	Brainstorming	“<...> I use brainstorming to develop listening and speaking skills <...>” (P3); <...> For those who do not dare to express their thoughts out loud to the whole class, the ‘Rain of Thoughts’ is useful <...>” (P1);
	Discussions	“<...> I use discussions, I give them the opportunity to listen because they like it <...>” (P5); “<...> I make it possible to listen to discussions, dialogues <...>” (P7); “<...> Like those students who learn and learn about the world through active participation <...>” (P4)
	Debates	“<...> Enjoy debates, speeches, talks, sharing experiences <...>” (P11); “<...> Encourages independent questioning and critical thinking, listening to oneself and others <...>” (P8)
Learning through practical experience in collaboration, etc.	Projects method	“<...> The projects method helps to take into account each child’s learning ways, styles, abilities, possibilities and needs <...>” (P8); “<...> This method allows the topic to be understood and mastered in an individual way of learning <...>” (P6); “<...> Public presentations are very useful, because not only do they learn, but they also teach their classmates <...>” (P3)



	<p>Working in groups</p>	<p>“&lt;...&gt; It is useful for everyone because it develops a variety of skills: communication, analysis, decision-making, public speaking, critical thinking, reflection, evaluation of one’s own contribution and the work of the group &lt;...&gt;” (P8); “&lt;...&gt; It encourages people to share their experiences, to learn from each other &lt;...&gt;” (P11); “&lt;...&gt; My students are used to working in groups, they like it, because if one of them doesn’t understand, the other one explains it to them &lt;. ...&gt;” (P1)</p>
	<p>Pairs in a collaborative way</p>	<p>“&lt;...&gt; It is enjoyed by those with weak skills, they need a supportive friend &lt;...&gt;” (P7); “&lt;...&gt; It is enjoyed by those who know how to communicate, cooperate, especially the method of ‘Mutual Learning’ and ‘Jigsaw’ &lt;...&gt;” (P10); “&lt;...&gt; Those who are inclined to talk like pair work &lt;...&gt;” (P9); “&lt;...&gt; Useful for all, but especially for students who receive information through their feelings &lt;...&gt;” (P6)</p>

As shown in Table 4, the participants understand that the success of students' learning depends on the appropriate choice of learning methods. Appropriate methods help students to develop missing skills, to actively engage in the learning process, to meet their learning needs, and to individualise their learning. However, the experiences of the participants in the study reveal not only the strengths but also the weaknesses of the learning methods used. Some of the answers were: “<...> There is not always time for discussion and not all students discuss <...>” (P5); “<...> Only those enjoy who like to listen and talk <...>” (P11); “<...> It’s difficult to involve, to ask everyone, others just passively participate and listen <...>” (P3); “<...> Some students are very afraid of such tasks <...>” (P1). This shows that although teachers claim to want to get to know the students well and to select methods according to their personal characteristics, abilities and learning styles, they often simply apply different methods to the whole class of students, stating that “<...> It is useful for everyone, even for those who are not actively involved, but still hear what is explained <...>” (P6). Thus, the appropriate choice of learning methods depends on the teacher’s ability to get to know all the students well.

The individualisation of learning through *information technologies* as a learning tool was also found to be relevant and strongly supported by the research participants, as it meets the learning needs of all students, with particular emphasis on the visualisation and demonstration capabilities of the digital whiteboard. The research participants say: “<...> Learning without digital technologies is not possible today as it meets the needs of all students <...>” (P10); “<...> It is enjoyable and suitable for everyone, and you can communicate and collaborate effectively with your students <...>” (P11); and “<...> The use of IT engages

*students of different learning styles in an interactive way, and allows anyone to learn effectively <...>*” (P7). Studies (Miller et al., 2015) have shown that presentations delivered by using a digital whiteboard in the classroom are more comprehensible and stimulate students’ interest. Teachers can experiment with the digital whiteboard, making it easier to engage students in their learning, tailored to the needs of each student. For all today’s students, information technologies open up a wider range of learning pathways and, at the same time, opportunities for individualised learning in terms of time, space, reflexive interaction and feedback, learning content and process. This is highlighted by the participants in their statements: “<...> *I use the SMART Board because there is the possibility of making a recording of the lesson, which will make the information re-usable, and it will be better for all the students to absorb it <...>*” (P8); “<...> *I use the digital board for showing videos, websites, solving tasks <...>*” (P4); “<...> *The virtual survey is suitable for different styles of learners, and can be carried out with computers, tablets or phones via Moodle or Kahoot <...>*” (P6); “<...> *IT applications such as Compendium, FreeMind, Freeplane, Pimki, SciPlore MindMap-ping, WikkaWiki, VUE, XMind, etc., are great for concept mapping <...>*” (P9); “<...> *I use the digital application Mozaic Education, which engages everyone because of its demonstrativeness and interactivity <...>*” (P5). Thus, the participants’ practical experiences show that the use of information technologies and the organisation of lessons in a virtual space offers opportunities for individualised learning through factors such as flexible time and space, reflexive interaction between students and teachers, collaboration, individualised learning content and learning process.

Thus, we can say that the participants of the research have accumulated a considerable amount of knowledge in the practice of facilitating the individualisation of the learning of students in grades 5–8. However, teachers’ experiences are more in the stage of ‘I know and I am able to’ (i.e., how, in what ways and why individualisation of learning is needed), than the stage of ‘I know how and do’ always in practice. The participants are able to identify the main aspects of individualisation, to identify their expression, to identify the competences required for them, and to identify and describe individual practical situations of facilitating the individualisation of the learning of students. However, in real practice, individualisation is fragmented when it comes to knowing students, their personal qualities, abilities and needs, and trying to select the most appropriate learning methods and tools for the content.

## **Conclusions and discussion**

Individualisation of students learning remains relevant not only to ensure that each of them is motivated to engage in the learning process, but also to develop the ability to learn independently and achieve personal success in learning,

according to their individual abilities, interests and learning needs. Therefore, the teacher has a huge responsibility as the implementer of individualisation of learning, whose professionalism and understanding of their new role in the process of teaching determines the success of learning of each student. Similar conclusions are drawn by S. Poteliūnienė et al. (2019), whose research has shown that the implementation of educational content, the individualisation of the educational process, and the pursuit of quality, efficiency and productivity remain some of the main challenges for teachers in practice.

From the perspective of the participants' personal experiences, the assessment of the concept and expression of individualisation of students' learning in real situations of learning reveals a view of individualisation that does not always coincide with the way it is expressed in theory. Individualisation of learning, based on the informants' narratives, is related to knowing the student; the student's orientation to take responsibility for learning; adapting the learning methods, ways and means to each student's abilities, needs and interests, where each student can feel and be valued as an equal participant of learning. R. Deakin Crick et.al. (2013) also point to the teacher's knowledge of students' personality and personal history as an important moment in facilitating the individualisation of students' learning. The research has highlighted that the perception of individualisation of learning is not fully understood and well defined by the research participants due to different interpretations of the concept, and is, therefore, not fully realised in practice. Experiences of individualisation reveal real-life learning situations in which research participants do not always facilitate the individualisation of each student's learning because they do not have a good understanding of each student's personal characteristics, abilities, needs and interests. During the interviews, the participants identified the challenges that prevent them from doing so: lack of time and resources, excessive workload, which indicate a lack of professionalism among teachers. The strengths identified by the research participants as their capacity to individualise learning are difficult to realise in practice and teachers, therefore, need to continuously develop these skills. J. Hughey (2020) discusses the revised role of the teacher in individualised approach encouraging educators to assume the role of facilitators, guides, and coaches. In individualised learning educators need to become the leaders to support learners search for finding their own knowledge.

The limitations of qualitative research in assessing the individualisation of students' learning in grades 5-8 are related to the inevitable subjectivity of qualitative research. Although the design and conduct of this type of research has met these requirements, the generalisation and applicability of the findings is partly limited by the small number of participants. It is the results of the qualitative research that are unique and specific to the individuals involved. While it would be wrong to apply the findings to all teachers, it is likely that the reflections on the experiences of the teachers of this study have revealed the complexity of in

facilitating the individualisation of the learning of students, which requires teachers themselves to be professional in order to get to know each student, and to develop their own skills to enable them to share responsibility with students and to select appropriate learning methods, techniques and means that reflect the individual abilities, needs and interests of each student. The findings of the study allow us to foresee further research into this phenomenon in order to find out the opinions of general education teachers through quantitative research.

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# INDIVIDUAL LEARNING PLAN OF A SECONDARY SCHOOL STUDENT: THE BASIS FOR DESIGNING PROFILED EDUCATION AND A CONSCIOUS CHOICE OF PROFESSION

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**Abstract.** *In the 21<sup>st</sup> century, the search for a new educational paradigm is characteristic of all countries of the European Union. The predominance of the traditional information approach, which is mainly focused on the transfer of knowledge to learners, creates a passive person (Thoresen, 2007). Profiled education represents a new model of the system of education with a student as a subject of the educational process in its center. Within this model, the educational process is organized in accordance with learner's interests, abilities, and capabilities, i.e., it has a natural character. The key quality of a student within profiled education is his/her subjectness. This quality is formed under the conditions of student's active, conscious position in the educational process (Čehlovs, 2011). An individual learning plan developed by the student together with the teacher becomes the basis for designing profiled education, which contributes to a conscious choice of profession. The subject of research is the individual learning plan of a senior secondary school student as the basis for designing the content of profiled education and for the conscious choice of profession. The aim of the study is to consider the structure of student's individual learning plan and to determine its role in the design of profiled education and in the choice of profession. The research methods include theoretical analysis, observation, and survey. As a result of the research, the structure and content of the individual learning plan of a senior secondary school student were determined, and the analysis of the role of the individual learning plan in the design of profiled education and in the conscious choice of profession was carried out.*

**Keywords:** *basic general education subjects, individual learning plan, profiling subjects*

## Introduction

### Topicality of the research problem

The history of pedagogy testifies that changes in the system of social relations actively influence education, requiring it to be mobile and able to respond adequately to the tasks of the new historical stage (Ross, 2006; Thoresen, 2017). In the 21<sup>st</sup> century, profiled education is becoming increasingly relevant.

The transition to profiled education is a requirement of the time, the current stage of the development of society. A contemporary student needs to be provided with a wide choice of educational programmes, an individual learning plan, as well as various study profiles, which contributes to the student's personal and professional self-determination. The level of students' personal development, the breadth and flexibility of their professional training, the desire for creativity, and competence in solving non-standard problems turn out to be some of the most important factors in the development of society (OECD, 2018; Alijevs, 2021). Profiled education is a progressive direction of education, enabling its renewal and improvement, thus reaching a new level in the development of education in Latvia (Aliyev, Chekhlov, Cehlova, & Kevisa, 2022). The development of student's individual learning plan is of particular importance in this process (Solberg, Phelps, Haakenson, Durham, & Timmons, 2012). The individual learning plan determines the content of profiled education and a conscious choice of profession.

The research problem is the individual learning plan of a secondary school student as the basis for designing the content of profiled education and for a conscious choice of profession.

The aim of the study is to consider the structure and content of student's individual learning plan and to determine the role of the learning plan in the design of profiled education and in the conscious choice of profession.

The research methods include theoretical analysis, observation, and survey.

### **Characteristics of the individual learning plan of a secondary school student**

An important feature of the individual learning plan is its nature-appropriate character. The individual learning plan is developed considering the needs, inclinations, abilities, and cognitive interests of secondary school students. Thus, the individual learning plan is nature-appropriate, i.e., it corresponds to the nature of each student. This is the implementation of the humanistic concept proposed by J.A.Comenius in the real pedagogical process in accordance with universal human values (Comenius, 1907).

The individual learning plan is developed based on an individually oriented approach which embodies the ideas of a humanistically oriented educational paradigm. The essential characteristics of the individually-oriented approach include the following:

- consideration of a student as a subject of the educational process;
- the development of his/her abilities as individual potentialities;
- interaction between a teacher and students based on moral values;

- the development of educational technologies that ensure the development of student's subjective experience in accordance with socially significant experience (Čehlovs, 2011).

Within this new humanistically oriented paradigm of education, the influence of teacher's personality does not decrease in profiled education; on the contrary, it increases. The teacher as a bearer of value orientations acquires the greatest importance. The nature of teacher's interaction with students also changes. It is based on moral values (Čehlova, & Čehlovs 2010).

The transition of an educational institution to the implementation of an individual learning plan involves different forms and methods of interaction between teachers and students; promising forms of work are tutoring, consulting, and modelling.

### **Implementation stages of the individual learning plan**

Individual learning plan → individual educational curriculum → individual educational strategy

An individual learning plan refers to a set of basic school subjects selected for studying from the curriculum of a general education institution, profiling subjects, specialized courses, research work, and various kinds of practice. Three conditions must be met for a conscious choice of profession:

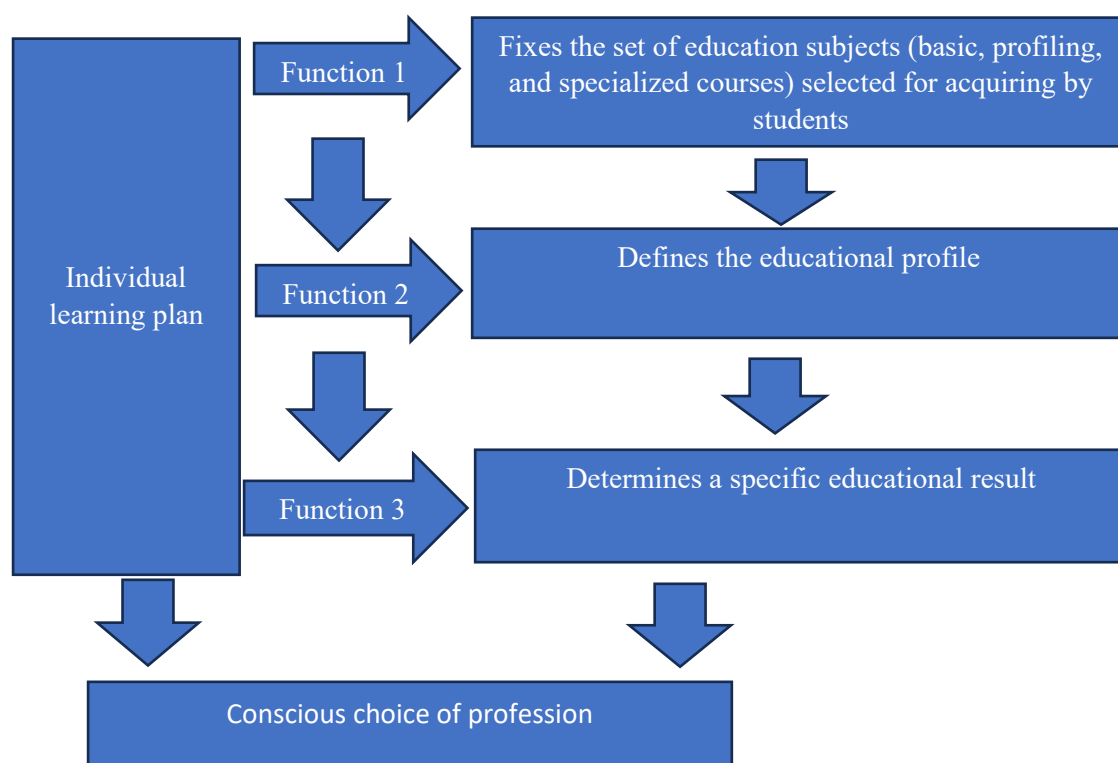
- correspondence between the choice of subjects and the interests of a secondary school student;
- the knowledge of one's abilities and capabilities;
- the assessment of the correspondence between one's abilities and capabilities and the requirements of a particular profession.

### **Functions of the individual learning plan**

The individual learning plan performs several functions (Figure 1). This plan:

- fixes the set of education subjects (basic subjects, profiling subjects, and specialized courses) selected for acquiring by students;
- defines the educational profile;
- determines a specific educational result that a student must achieve by finishing secondary school;
- allows the student to practice self-determination and choose the right profession in accordance with his/her interests and capabilities (Dautova, 2006).





*Figure 1 Functions of the individual learning plan (made by authors)*

## **Individual learning plan as the basis for a conscious choice of profession by a senior secondary school student**

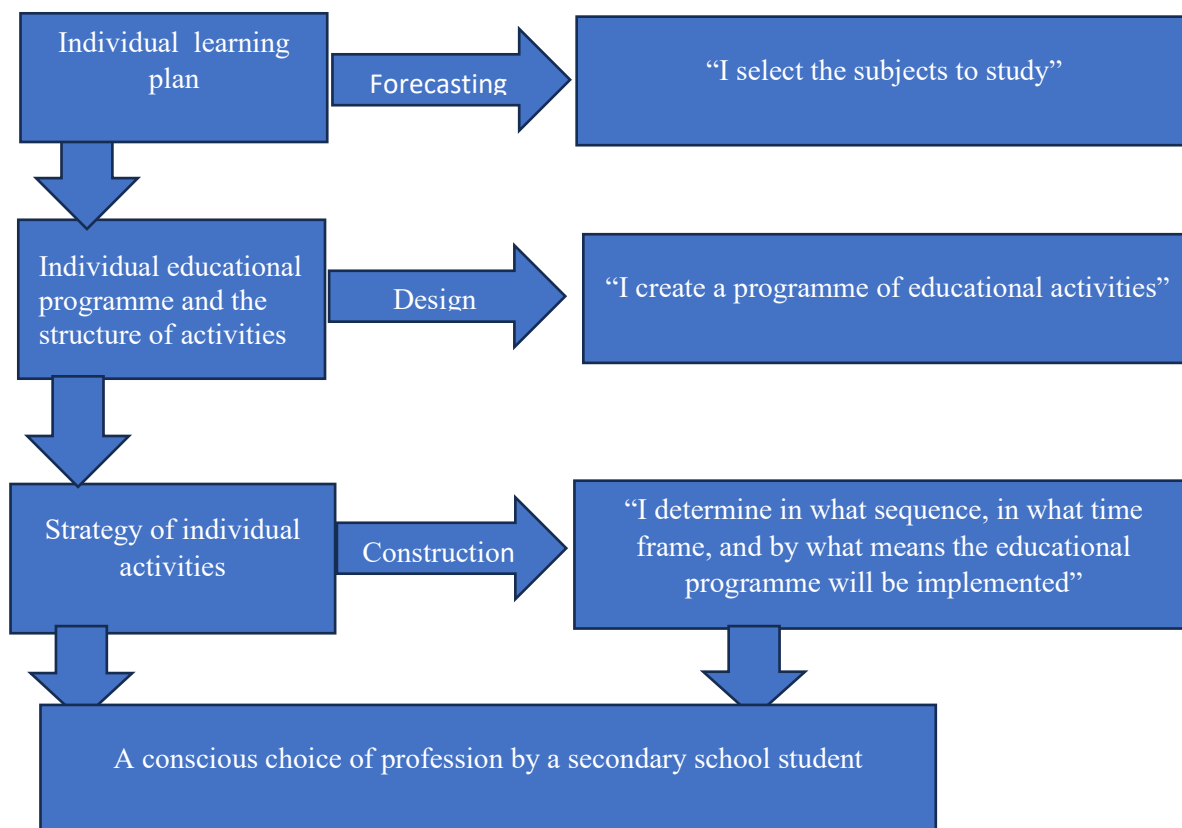
### **Individual educational programme**

The individual learning plan is the basis for the development of an individual educational programme. The individual educational programme is created based on the interaction between the student and teachers, and it involves their close collaboration. The individual educational programme performs several functions, namely, the regulatory, informational, motivational, organizational, and self-determination functions.

### **Implementation of the individual learning plan**

The implementation of the individual learning plan and the individual educational programme is carried out in the process involving the interconnection of various types of activities in accordance with the educational needs and cognitive capabilities of a senior secondary school student, as well as the specific conditions of the process of education in an educational institution, always taking into account the requirements of contemporary society. This is an activity strategy (see Figure 2). Thus, it can be suggested that the individual learning plan performs

the function of forecasting for a senior secondary school student - “I choose the subjects to study”, whereas the individual educational programme performs the function of designing for a senior secondary school student - “I am creating a programme of educational activities”; the individual development strategy, however, constructs educational activity - “I determine in what sequence, in what time frame and by what means the educational programme will be implemented”.



*Figure 2 Individual learning plan as the basis for a conscious choice of profession by a senior secondary school student (made by authors)*

Thus, the implementation of the individual learning plan is aimed at the personal and professional self-determination of senior secondary school students and at a conscious choice of profession.

### **The individual learning plan of a senior secondary school student**

The content, structure, and specific features of the individual learning plan of secondary school students are analysed in the profiled education implemented at the Department of Psychology and Pedagogy of Pushkin Lyceum. The concept of profiled education at the Department of Psychology and Pedagogy of Pushkin Lyceum was elaborated by Zoja Chehlova, Professor of the University of Latvia.

The content of the individual learning plan includes basic school subjects chosen by lyceum students from the lyceum curriculum, profiling subjects, specialized courses, academic research, and various kinds of practice (Chehlovs, & Chehlova, 2015). The individual learning plan does not define a rigid set of subjects for each lyceum student and a rigid educational profile. Each lyceum student has the right to independently determine the educational profiles that are of interest to him/her, a set of education subjects (basic, profiling, and specialized ones) from those offered by the lyceum in accordance with the permissive student workload. This approach allows each student to formulate their own individual learning plan, their own individualized educational programme, and an individualized strategy.

The content of the individual learning plan also includes practice, which is regarded as the basis for a conscious choice of profession. The main methods of studying students' work during the practice included observation, the analysis of students' teaching activity, their relations with children, with other lyceum students, and their teacher. There was also used a questionnaire aimed to determine the motivation of senior secondary school students for the choice of a teaching profession.

At the Department of Psychology and Pedagogy of Pushkin Lyceum, the practice starts in form 10 in a children's creative studio. The studio is attended by children who are 5-6 years old. The lyceum students (ages 16-17) observed children's activities according to a definite programme, analysed the children's attitude to workshops and activities and to their teacher. The lyceum students independently developed questionnaires and tests and analyse the obtained results. They described the progress of their study in observation diaries. The students analysed the teacher's work, the children's activities and drew their conclusions, of course.

The most important point, however, is communication with children. The children's enthusiastic attitude to the lyceum students in the role of young teachers created the atmosphere of creativity. The lyceum students became different in their role of teachers – responsible, wise, trying to answer all children's questions and help them.

In the 10<sup>th</sup> form, the practice lasts for two months. At the end of the school year, there was held a seminar session "My Pedagogical Achievements". The lyceum students talked about their work in the creative studio, the changes they observed in the six-year-olds at the final stage of work, and, most importantly, about the changes that occurred in themselves. This involved the pedagogical analysis of the results of their work in the creative studio, and the most serious results they identified were related to the changes in the relations of the lyceum students with their teachers. These transformed into relationships between colleagues interested in a common cause that was significant to everyone. More restraint also appeared in students' mutual relationships: brusqueness

disappeared, and teacher intelligence appeared in students' speech. It is interesting that the lyceum students themselves noted these changes in their observation diaries.

Moreover, the pedagogical practice had a crucial role in the choice of profession. For example, three students changed their educational profile. After the practice, they moved to a group specializing in psychology. "It is difficult to communicate with children"; "the children simply annoyed me", "the role of a teacher is of little significance, and this can be observed by the attitude of parents towards school." These were their comments about the reasons for moving to another department. All in all, 70% of the lyceum students were confident in their choice of profession - becoming a teacher or an educational psychologist. On the other hand, 30% of the participants expressed a certain degree of doubt. "I'm an introvert, and I think it will be difficult for me to work as a teacher, but I'll try to improve myself. I still have time to think it over."

In the 11<sup>th</sup> form, the students (ages 17-18) had their teaching practice at the primary school of Pushkin Lyceum. Its goals and objectives were more complicated. The lyceum students studied the working methods of primary school teachers. They recorded their observations and conclusions in observation diaries. They already knew different concepts of learning: developmental, personality-oriented, problem based, and modular learning. The main objectives were to develop interest in the teaching profession, strengthen students' desire to become a teacher, and develop the correspondence between the requirements of the teaching profession and the individual characteristics of the lyceum students. It was also important that the lyceum students were engaged in research activities in primary school. Each of them worked on a problem concerning the teaching and educating of junior schoolchildren that was of interest to them, e.g. "The development of creative abilities in primary schoolchildren", "The development of communication skills", etc.

An important factor regarding the development of interest in the teaching profession was the transformation in the relationship between the lyceum students and the teachers. Changes could be observed both in the positions of the teachers and the lyceum students. These transformed into the relationships of like-minded colleagues, both having professional pedagogical knowledge. The teachers conducted the classes and then analysed these classes with the lyceum students. According to the lyceum students, the pedagogical practice contributed to their self-knowledge. In the classes of pedagogy and psychology, the students had to deal with the situations and tasks that contributed to the development of reflection and self-esteem, e.g., analysing the teacher's methods of work and their style of communication with children.

When conducting an experiment in the 12<sup>th</sup> form, the students (ages 18-19) relied on what had already been achieved: a changed attitude towards educational activity (as an educational professional one), a changed attitude to one's place in

the class ( as a valuable personality), an attitude to oneself (as an individuality, a person capable of mastering the profession of a teacher-psychologist), an attitude to the teacher (as a like-minded person, a colleague in a common socially significant cause). Classes in pedagogy and psychology and the teaching practice were of great importance in the development of professional interests and students' attitude towards themselves as respected individuals.

In the 12<sup>th</sup> form, the practice lasted for a whole semester. For a month, the lyceum students observed teachers' lessons once a week, studying the characteristics of children's behaviour, getting acquainted with the teachers' working methods, and their style of communication with children. After that, the lyceum students acted as teachers for two months, each teaching their own class (forms 3-4), conducting classes in the Russian language, literature, and mathematics. It was a real pedagogical experience in the role of a teacher. They experienced both success and failure, the main achievements being the joy of communicating with children in the role of a teacher and the significance of new relationships with the teachers.

Interacting with the lyceum students on the basis of common values, the teacher treats the student as a unique and full-fledged partner in pedagogical activities. By opening up to the students and gaining access to their inner world, the teacher thereby pushes the boundaries and enriches the content of his/her own "I". This results in the formation of unity with another person, a spiritual community, which is the basis for the development of student's creative abilities, communication and collaboration skills, a truly wonderful gift of revealing their inner world and introducing them to the world of another person. The human essence only appears in communication, in the unity of a person with another person, in the unity underpinned by the reality of development between "I" and "you". At the same time, educational relationships are enriched by moral relationships. It is not so much the school marks that become valuable, but the process of cognition itself, the person himself/herself in all the richness of his/her individuality.

At the final stage of the experimental work, all the lyceum students possessed the following characteristics. Each student recognized himself/herself as being a subject of educational activity and a person worthy of respect. The students strived for the most complete self-expression and the fullest self-realization. Their activity was underpinned by various motives, and the leading ones were those of professional self-determination. The students had definite ideas concerning their future related to their vocation and purposefully prepared themselves for the profession they were interested in, organizing the conditions for developing themselves as subjects, personalities, and professionals. There could also be observed the development of reflection, self-esteem, self-realization, and educational competence. All this was pointed out by the lyceum students at the

conference “My First Teaching Experience” organized after completing their teaching practice.

At the final stage of work, we observed an enthusiastic attitude to research activities related to the issues concerning the teaching and upbringing of primary schoolchildren. Students’ research projects had scientific and practical value. The primary school teachers used the obtained results in their work with children and parents. This contributed to the development of cognitive and professional interest. The profession of a teacher-psychologist became attractive and necessary for the students. Studying at the Department of Psychology and Pedagogy” helped them to understand themselves, find their calling, and determine their future.

The analysis of the educational system implemented at Pushkin Lyceum leads to the conclusion that professional education in the humanities refers to the process of learning whose content represents a harmonious relationship between the fundamentals of the chosen professional specialization and the general cultural education, which corresponds to the main trends in the development of senior secondary school students and determines the development opportunities of profiled education. Profiled education, enriched with humanitarian foundations, is a natural leader regarding the development of new formations characteristic of this age period – readiness for personal and professional self-determination (Vygotsky, 1984). The experience of studying at the Lyceum has shown that the process of learning according to the chosen profile is effective for the choice of profession by the lyceum students.

## **Conclusions**

The individual learning plan of a lyceum student is the basis of the content of profiled education. The content of the individual learning plan includes the basic school subjects, profiling subjects, specialized courses, practice, and academic research. A key feature of the individual learning plan is its nature-appropriate character: it corresponds to the interests, abilities, and capabilities of a particular lyceum student. The individual learning plan is based on the individualized approach to learning, which embodies the ideas of the humanitarian, humanistically oriented paradigm of education. The analysis of the main functions of the individual learning plan has been carried out. The individual learning plan serves as the basis for the development of an individual educational programme. In this way, a strategy for designing profiled education is implemented.

Practice is of particular importance in the personal and professional self-determination of a lyceum student and in the conscious choice of profession. During the practice, a lyceum student correlates his/her abilities and capabilities with the requirements of the chosen profession. A conscious understanding of the correspondence between one’s abilities and capabilities with the requirements of

the particular profession helps to convince the student of the correctness of his/her choice of profession. Thus, educational activity transforms into educational-professional activity. Practice is also related to students' research work. The students of Pushkin Lyceum presented their research projects at a conference held at the University of Latvia and won awards at an international conference.

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# PREPARING TEACHERS FOR INCLUSION IN LITHUANIA: TEACHER EDUCATORS' APPROACHES TO DIVERSITY AND EXISTING CHALLENGES

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**Abstract.** *Inclusive education is a universal pedagogical trend, covering a broad range of research areas such as race, ethnicity, gender, culture, language, religion, and ability. An inclusive system concerns the rights, social justice, and equity within education for all, especially the marginalised groups (UNICEF, 2022). Lithuania has officially rolled out new legislation (in 2011) and structural changes (in 2024) to its educational system, moving it from a multi-track system to an inclusive one. However, teachers have reported implementation difficulties such as differentiating teaching methods, fostering student socialisation, and lacking multiprofessional collaboration and dialogue with parents (Lakkala et al., 2019). Contextual urgency lies in the changing demographics of the student body and impacts the reconsideration of diversity and inclusion in Lithuanian classrooms. This study focuses on teacher educators' (TEs) perspectives at a major teacher training university in Lithuania. Semi-structured interviews were conducted with faculty members to understand how diversity and inclusion are understood, interpreted, and implemented within the faculty. This research revealed current practices within teacher training regarding diversity, highlighting strengths, challenges, and potential enhancements. Critical implications for preparing future educators for inclusive classrooms are discussed.*

**Keywords:** *Inclusive education, personalised learning, differentiated learning, teacher training.*

## Introduction

Inclusive education in Lithuania only came into effect as law in 2011, intending to replace a history of segregated education. While both experts and the public are concerned about how schools and teachers are not ready for this change from a multi-track to an inclusive one, teacher education institutions took on the role of ensuring that trainee teachers are ready for the practical demands of inclusion in their future classrooms.

Meanwhile, contextual changes urge change in schools to cater better to their increasingly diverse student body. With the enforcement of structural change into



all-inclusive starting January 2024, the topic is current in practice and research. This research aims to analyse how a major teacher-training university in Lithuania addresses the topic through the views of faculty members by identifying how inclusive education is being perceived, understood, addressed and implemented in their currently taught Degree courses. While the curriculum is being touched upon, the focus is on how faculty members perceive it rather than being an investigation of the curriculum itself. The main research question is: How is inclusive education being understood, addressed and approached in teacher training programmes in Lithuania?

## **Literature Review**

Inclusive education traces back to its initial inception in the nineteenth century when attempts to assimilate within compulsory schooling are being gradually transformed today into a postmodern interpretation rooted in social justice and cultural pluralism. UNICEF stated, "Inclusive education allows students of all backgrounds to learn and grow side by side, to the benefit of all" (UNICEF, 2022). Inclusive education remains a broad topic of research and values today, including discussion on race, ethnicity, gender, language, religion, and (dis)ability. An inclusive system concerns the rights, social justice, and equity within education for all, especially the marginalised groups: "An important element of inclusive education involves ensuring that all teachers are prepared to teach all students. Inclusion cannot be realized unless teachers are empowered agents of change, with values, knowledge and attitudes that permit every student to succeed. Despite their differences in teacher standards and qualifications, education systems are increasingly moving away from identifying problems with learners and towards identifying barriers to learning. To complete this shift, education systems must design teacher education and professional learning opportunities that dispel entrenched views that some students are deficient, unable to learn or incapable" (UNESCO, 2020). Advancing professional learning opportunities for inclusive education is at the core of this paper.

Contextualising the study requires looking at Lithuania and the historical development of inclusive education. Similar to other post-Soviet nations, Lithuania had a well-established system of special education, whereas the development of inclusive education was initiated after the nation regained its independence in 1991. Hence, the idea of inclusive education in Lithuania is fairly new with its current focus being the official structural shift from a multi-track system to an inclusive one officially starting in January of 2024. As special schools are being closed, the number of children enrolled in mainstream schools is increasing with its function being expanded to promote inclusion. This implies moving away from the language of learners with developmental disorders to learners with special educational needs (SEN). With changing demographics such

as a vastly increasing number of returned immigrant and refugee pupils, inclusion in learning settings requires more versatile skills and expertise based on a profound understanding of the ideology of inclusion (Määttä, Äärelä & Uusiautti, 2018). Current goals of inclusive education aim to remove barriers (physical, emotional, and social), and to provide quality education and necessary support for every learner- at their nearest educational institution (Bethere, Kasiliauskiene, Pavitola & Usca, 2023). Current discussions focus on the need to strengthen the support systems in schools, including increasing the number of educational support specialists and teaching assistants in schools, adapting the schools' physical environment for inclusive education, increasing the qualifications and competencies of all current and prospective teachers to prepare schooling practices that cater for pupils with diverse educational needs (*ibid*). Inclusion of diversity currently seems to focus on the diversity of abilities and learning support required amongst learners.

However, teachers have previously reported ongoing support of segregationist ideas (Ališauskas & Šimkienė, 2013) and continue to experience implementation difficulties in differentiating teaching methods, feeling a lack of readiness to foster student socialisation and dialogue with parents, and experiencing a gap in multiprofessional collaboration (Lakkala, Juškevičienė, Česnavičienė, Poteliūnienė, Ustilaitė & Uusiautti, 2019). Contextual urgency lies in the changing demographics of the student body. It impacts resulting in the urgency to reconsider diversity and inclusion beyond SEN in Lithuanian schools and how current teacher training prepares future teachers for this. Here, the practical theory of inclusive teachers requires the ability to recognise and reflect on the factors that support or hinder the inclusion of all students (*cf.* Shani & Hebel, 2016)- both the obvious and the hidden. This is especially true in the context of educational reforms in Lithuania since its re-independence in 1990- which has heavily impacted (initial) teacher training curriculum, especially while moving towards competencies-based education (Rutkienė & Ponomarenko, 2019). Specific to inclusive education, current teacher training in Lithuania requires every teacher who works in preschool, primary school, or as a subject, vocational, supplementary informal education teacher must complete at least 60 hours of training in Special Needs Education and Psychology (according to the Requirements for the Qualification of Teachers, 2014-08-29 No. V-774, par. 9) (European Agency for Special Needs and Inclusive Education, 2020).

As the new teachers' competence frameworks look to refocus on teachers' didactical competencies (individual learning needs, differentiation of teaching instruction, and teachers' self-reflection) and general competencies (*i.e.* professional communication skills, cultural competence)- beyond merely subject-focused competencies. How teacher educators (TEs) comprehend inclusion and diversity in education- within the new requirements- significantly influences their teaching and modelling of these principles to the prospective teachers.

## Methodology

Employing a qualitative case study methodology, this research zeroes in on a major teacher training university in Lithuania. This institution is selected for its leadership in teacher education, particularly its involvement in innovative pedagogical methods and international educational collaborations. The case study aims to provide an in-depth exploration of how TEs integrate personalised and differentiated learning approaches in their curriculum and teaching.

*Table 1 Respondent demographics (made by authors)*

Teacher Educator	Gender	Teaching experience Novice (under 5 years) / Expert (over 5 years)	Interdisciplinary/ multidisciplinary background	Personal experience with inclusivity	Role in Inclusive Education within Teacher training
TE1	F	Novice	Natural Sciences Education	Study exchange	Indirect
TE2	F	Expert	Interculturality	International student	Indirect
TE3	F	Novice	SEN	Internship abroad	Direct
TE4	F	Expert	Educational leadership and management	International projects	Indirect
TE5	F	Novice	Curriculum design and integration	International projects	Indirect
TE6	F	Expert	Mathematics Education	Teaching exchange	Indirect

Data is collected from six TEs at a major teacher training university in Lithuania, chosen through opportunity sampling to ensure a representation of varied expertise, including those actively engaged in developing and applying innovative, personalised educational strategies. The participants represent different facets of teacher training, such as primary, secondary, subject, and special education, offering insights into a broad spectrum of teaching and learning contexts. For clarity and anonymity in our analysis, we will refer to these respondents as “Teacher Educator 1” (TE 1), “Teacher Educator 2” (TE 2), and

so forth. The demographic distribution of the respondents is shown in Table 1. For the purpose of later stages of the project which may allow for comparison and identifying trends, teacher experiences, professional and personal backgrounds, and own perspectives on their roles in delivering inclusive education in their own teaching.

All of the TEs in the discussion are female. Their teaching experience varies from five to twenty years, from novice to expert to university-level teaching. The subjects they teach encompass a range of topics, including natural sciences, primary education, STEM education, pedagogical theories, curriculum and more. Additionally, the discussion touches upon various degree programs within the field of education. The conversation did not specifically include colleagues from the field of Inclusive Education itself. Instead, the focus was on TE involved in initial teacher education programs. This highlights the diverse experiences and perspectives of TEs in the broader context of education.

The semi-structured interviews consist of 30 questions designed to explore educators' perceptions and practices regarding personalised learning and differentiation in the classroom. The interviews begin by gathering demographic information about respondents, including their role as faculty members, educational background, and language proficiency. Subsequently, the questions cover various aspects, such as the structure of the Teacher Education Program, the university's stance on inclusion and diversity, faculty members' experiences, including personal experiences with diversity, opinions on inclusive education in Lithuania, and awareness of relevant documents. Additionally, there are inquiries about tools and strategies for differentiated learning, assessment methods, technology integration, collaboration, challenges and reflections on national and institutional policies. The interviews had an average duration of around 1 hour and 20 minutes each and were simultaneously recorded and transcribed through the Microsoft Teams program. Recordings are stored in the university cloud space and are only accessible by the researchers.

These interviews are analysed through thematic analysis, a method that facilitates identifying patterns and themes related to the implementation of personalised and differentiated teaching methods (Braun & Clarke, 2006). This analysis aims to elucidate the educators' perspectives on these pedagogical approaches and how they are operationalised in teacher training, particularly in light of Lithuania's commitment to inclusive education.

For accurate data collection validity was ensured through carefully designed interview questions that align with research objectives and a standardised interview process to minimise biases. Multiple interviews with diverse participants were conducted to enhance reliability, ensuring consistency and robust findings. Ethical considerations were central, with informed consent and confidentiality measures in place.

## **Research Results**

When asked how inclusive education is implemented, most TEs refer to how they cater to their students, who are either prospective or current school teachers: “We have some students who have special needs related to their disabilities. For example, I have a few students with hearing impairments. So, when I prepare for lessons for subjects, I keep in mind that some material needs to be adapted a little. We don't, unfortunately, have enough literature in Lithuania, so I sometimes need to translate literature or videos from English to Lithuanian or think of other ways to adapt” (TE 3).

On the other hand, a few TEs pointed out how they incorporate discussions of inclusive values through their teaching through interacting with students: “I have two different groups [of students]: with very young students who do not have any teaching experience I can shape them and create the right attitude and reflect on their understanding on the concept of inclusion. With the other group [-current teachers who are requalifying], I sometimes comment [on their current practices], but not always- depending on where the discussion takes us” (TE 1).

When invited to discuss their own implementation methods for inclusive education, TEs acknowledged being supported by the university's extensive experience and expertise in terms of teaching and researching personalized and differentiated learning practices. They reported adjusting their own teachings in all cycles of teaching, especially after receiving practical training courses such as Universal Design for Learning (UDL), ICT applicational tools and methods, active learning in the field, guest expert lectures, creative assessment designs that invite students' personal interests and strengths. TEs also suggested that having the opportunity for ongoing professional development and learning with colleagues through taking part in international projects allows them to further advance their own practices, before sharing them onwards with their own students.

A few TEs mentioned that their personal experiences of contact and co-work with the physically impaired or SEN allowed them to be more open as people, teachers, and sometimes frontiers when rolling out inclusive schooling and relative teacher training. Almost all TEs suggested that contextual specification implies a lack of the general public's contact with matters around diversity and hence, inclusion. TEs also take on the role of being one starting point to changing the nation's narrative on diversity and inclusion: “We have to first think about how to work with adults' attitudes, when some [people's attitude] seem close-minded, it can be that they just don't understand how to approach the topic or the right language to apply, and this fear turns into rejection. But when you have some experience of contact and thoughts on the topic, you are more open for diversity” (TE 5). The role that TEs play in implementing inclusive education has also been pointed out: “In some ways, we are working with (prospective) school teachers,

but we also need to think about preparing them to discuss inclusion matters with their future school administrators, colleagues, and their pupils' parents" (TE 2).

In terms of how its teacher training programmes prepare future teachers for inclusive practices, some suggested the need to expand on diversity within classrooms limits to attempt to inclusion on SEN, but rarely goes beyond such to touch on matters of race/ethnicity, gender, culture, language, religion, and more: "People are becoming more comfortable to talk about SEN such as the ability to talk about disabilities... but, uh, I'm not sure about minorities... because Lithuanians are conservative, and still we have political conflicts with [name of country]. Regions with specific minority groups still very much live within separate communities, attend minority schools that teach in other languages and do not participate in the Lithuanian educational system at all. Similarly, there is a lack of opportunity for contact, understanding, and so, openness" (TE 4). Some, on the other hand, relate inclusion beyond SEN, as "... not only about health issues but also gender issues- such as gender stereotypes in our textbooks, and now we also have a growing number of immigrant and refugee students- and so it also relates to diversity. In this sense, we can talk about inclusion in much broader ways" (TE 3).

When asked about factors hindering the implementation of inclusive teaching in both university-level teaching and preparing students for future classrooms, TEs suggested that support and resources are mostly sufficient, with space to discuss and request additional material or international collaboration. However, a current challenge includes when newly qualified teachers enter schools for their teaching practices and find that what the university has done to prepare them for inclusivity is not understood the same way as current in-field teachers who may act as mentors to the new teachers: "We see our university study programmes as a place that prepare future educators or educational support specialists. We explain theoretical aspects but also allow our teachers to reflect on their teaching placement experiences, for example, by implementing personalised learning approaches. [The problem is that] ... when our students start working in schools, they come back with like an argument for a while because what they observed in real life practices is that not all schools understand the idea of inclusive education- some can also be openly against it" (TE 6).

There is also a sentiment of inclusive education depending on personal willingness affected by personal beliefs: "I don't think that it's obligatory for *all* teachers to know more about inclusive education because there is enough information in the training programmes and around us... But I think all teachers need much more practice with cases of inclusion. Generally, they are educated. Theoretically, they have the knowledge; practically, they lack opportunity. Still, this depends on the person if he/ she wishes to advance or stick to just the basics" (TE 2).

When invited to make suggestions to improve the implementation on the university level, TEs mentioned that despite the university's commitment and official declaration to inclusive education, the university's own implementation lacks standardisation. This, however, provides flexibility when catering for individual students' needs: "Formally, we have a special department where university teachers can approach to get advice on how to provide SEN for specific students. Informally, for example, my colleagues ask me [as a lecturer on educational psychology] what to do when they have students with SEN- for example, autistic students and so on, and I will give advice. You just need to find the right people to talk to. We solve problems as a team, and we are looking for solutions through discussions, case by case" (TE 1). On the other hand, when invited to make suggestions to improve implementation on the school level, TEs suggested methodological support that approaches the school in their contexts, aiding the school's evaluation based on contextual specificities when prescribing solutions for change together with the schools and current staff members.

An overview of the analysis is included in Table 2, where two to five themes emerged through each of the five lines of inquiry. Under each theme, implementation specifications have been included. In short, TEs emphasize catering to students with special needs, adapting materials, and fostering inclusive values through discussions. They draw on the university's support, incorporating personalized and differentiated learning practices, and engaging in ongoing professional development. TEs highlight personal experiences with diversity and advocate for changing societal attitudes toward inclusion. The role of TEs in preparing future teachers for inclusive practices is discussed, with an emphasis on addressing a broader range of diversity issues. Challenges include discrepancies between university preparation and in-field teaching practices and the impact of personal willingness and beliefs on inclusive education. TEs suggest improving standardization at the university level and providing methodological support tailored to schools' contextual specificities for effective implementation.

*Table 2 Emerging themes and reflection on implementation (made by authors)*

Inquiry	Emerging Theme	Implementation
1. Implementation of Inclusive Education	1.1. Approach to Special Needs	<ul style="list-style-type: none"> <li>- Adapting materials for students with disabilities.</li> <li>- Translation of literature or videos.</li> <li>- Innovative adaptation strategies.</li> </ul>
	1.2. Incorporating Inclusive Values through Teaching	<ul style="list-style-type: none"> <li>- Shaping attitudes of young students.</li> <li>- Reflecting on inclusion with requalifying teachers.</li> </ul>

	1.3. Support from the University and Ongoing Professional Development	<ul style="list-style-type: none"> <li>- Adjusting teaching based on training courses (e.g., UDL, ICT).</li> <li>- Participating in international projects for continuous learning.</li> </ul>
	1.4. Personal Experiences Influencing Openness and Advocacy	<ul style="list-style-type: none"> <li>- Contact with physically impaired or SEN individuals fostering openness.</li> <li>- Role in changing the nation's narrative on diversity and inclusion.</li> </ul>
	1.5. Role of TEs in Implementing Inclusive Education	<ul style="list-style-type: none"> <li>- Preparing future teachers for discussions on inclusion with various stakeholders.</li> </ul>
2. Teacher Training Programmes	2.1. Scope of Diversity in Training Programmes	<ul style="list-style-type: none"> <li>- Limited inclusion of diversity beyond SEN (e.g., race, gender, culture, language).</li> <li>- Challenges related to political conflicts and minority communities.</li> </ul>
	2.1. Expanding on the Notion of Inclusion	<ul style="list-style-type: none"> <li>- Recognizing inclusion beyond health issues to include gender, immigrant, and refugee issues.</li> </ul>
3. Factors Hindering Inclusive Teaching Implementation	3.1. Challenges in School Practices	<ul style="list-style-type: none"> <li>- Newly qualified teachers facing discrepancies between university preparation and in-field practices.</li> <li>- Varied understanding of inclusive education among in-field teachers.</li> </ul>
	3.2. Personal Willingness and Beliefs	<ul style="list-style-type: none"> <li>- Inclusive education dependent on personal willingness.</li> <li>- Personal beliefs influencing the desire to advance in inclusive practices.</li> </ul>
4. Suggestions for Improvement at University Level	4.1. Flexibility	<ul style="list-style-type: none"> <li>- Lack of standardization in university's implementation.</li> <li>- Flexibility in catering to individual students' needs.</li> </ul>
	4.2. Collaboration	<ul style="list-style-type: none"> <li>- Informal collaboration among colleagues.</li> </ul>
5. Suggestions for Improvement at School Level	5.1. Methodological Support	<ul style="list-style-type: none"> <li>- Methodological support tailored to schools' contexts.</li> </ul>
	5.2. Contextual Support	<ul style="list-style-type: none"> <li>- Context-specific evaluation and solutions for change.</li> </ul>



## **Discussion**

This case study demonstrated that inclusion is understood differently by TEs although the core message of catering for student diversity is present. They take on the interpretation role that translates between policy, schools, current and future teachers (who are also university students), and school pupils- while attempting to prepare their students to be able to do the same. This aligns with the proposal for global knowledge bases required for inclusive teachers (Allday, Neilsen-Gatti & Hudson, 2013). It is core for the teacher to be able to understand their role and position as a teacher of diverse students and to possess basic knowledge of special educational needs and the process by which the support is planned and constructed. While reflecting upon the challenges to prepare inclusive teachers who are ready for practice under major education reform, TEs expressed hopefulness towards prospective teachers: “They enter [the study programme] willing to change the situations to support each student even when they are new to the field. And because they [tend to feel like they] lack knowledge, they look to the university to be able to acquire new skills or become better at what they do. Maybe some teachers still don't understand, but they need time and practice- and actually, they have already put down their first steps for changing... and we are here with them” (TE 3). Echoing previous studies' calling for action to aid new teachers in coping with struggles while working with and effectively including children with diverse needs in the class (Anthony, Hunter, & Hunter, 2015), TEs showed awareness towards students' reported reality shock (McCormack & Thomas, 2003) during their teaching practices. Being aware, responding to, and using it as a reflexive opportunity for all students aids novice teachers' perceptions such as self-efficacy (Mintz, Hick, Solomon, Matziari, Ó'Murchú, Hall, Cahill, Curtin, Anders & Margariti, 2020), and has lasting effects on their professional identities- in this case, being an inclusive teacher. Nonetheless, within the context of this case study, the implementation of inclusive education, encompassing tools, methods, and resources employed by TEs, emerges as a process that is neither novel nor abrupt, contrary to the prevailing societal narrative. Discussions with TEs revealed a continuous discourse on the vision and strategies of inclusive education, consistent with C. Barnes' findings on the ongoing nature of discussions surrounding inclusive education practices (Barnes, 2011). Amidst these ongoing discussions, the immediate adoption of practices addressing diverse learning needs within current classrooms has gained prominence.

The interviews offered significant insights into the dynamic landscape of personalised and differentiated learning practices in Lithuania. As TEs highlighted, personalised learning plays a crucial role in facilitating inclusive learning environments, which aligns with the findings of J. Richards, who emphasised the role of student choice in enhancing engagement as an inclusive

strategy (Richards, 2008). For instance, providing students with an opportunity to present their learning outcomes using their preferred means or tools. This convergence underscores the importance of student autonomy in fostering meaningful learning experiences. Furthermore, the emphasis on students' interests echoes C. Tomlinson's argument that personalised learning should cater to individual preferences and motivations (Tomlinson, 1999). For example, to direct student learning in accordance to students' personal interests and strengths. While personalised learning is prioritised, discussions also brought to light the significance of contextualised learning, wherein personal experiences and backgrounds significantly influence the educational process (Clark, 2013). TEs demonstrated critical awareness and willingness to encompass real-world debates, dilemmas, social stigmas into their learning dialogues with their students. Some for example, chooses to invite field experts and connect to external resources, allowing students to experiment with questioning current norms, standards, and practices in a safe learning environment. With increasing internationalisation intention from higher education institutions in Lithuania, the staff and student body is changing accordingly. The who, what, when, where, how and why of the curricula are reflected upon by the TEs.

TEs emphasised that while personalised approaches are crucial in promoting inclusion, it is also very important to address teacher preparedness and flexibility when initiating and implementing such practices effectively. R. Johnson's noted that a personalised approach to education requires educators to be well-prepared and adaptable in their instructional approaches (Johnson, 2005). TEs spoke about preparedness as the readiness and capability of educators to effectively plan, deliver and adjust their instructions while they also meet the diverse needs of the students. Flexibility is seen by TEs as the ability to make real-time adjustments to ensure that all learners are included and have opportunities to succeed in their learning. They reflected upon it as a practical challenge in teacher training as it is not thought to be something which can be taught and learnt, but can only be obtained through practice.

Despite these alignments, the emphasis on diverse teaching methods within personalised learning strategies is similar to what was being highlighted by other authors as well who suggest a broader perspective on instructional diversity (Fleming & Mills, 1992). While the focus on personalised learning and contextualised experiences is supported by previous research, the integration of diverse teaching methods adds depth to the approach, ensuring that personalised education accounts for a variety of learning styles and preferences. TEs drew special attention to a Universal Design for Learning (UDL) training that was provided by the university as part of university staff's professional training in inclusion. Having the opportunity for teachers reflect upon their current practice- such as specifically course descriptions, recommended reading materials for the

students, and assessment options has been reported as an enlightening one that strikes immediate change.

On the other hand, unlike some studies (Arnaiz-Sánchez, De Haro-Rodríguez, Caballero & Martínez- Abellán's, 2023) suggested barriers to educational inclusion in initial teacher training as having limiting competencies acquisition, lacking attention to diversity, and theoretical learning having limited relevance to practical intervention- inclusive education is yet to be immersed into all teacher training subjects in Lithuania, and still heavily relies solely on the mandatory Special Needs Education and Psychology- a 60-hour course to cover the basics. There still lacks an overall inclusion lens across teacher training programmes. Catering for diverse learning needs seems to still rely on individual effort and willingness- evident both at university and school levels. TEs have reported major concerns that inclusive teaching methods still tend to be seen as something left to the individuals to decide when they are ready to implement, whereas these changes in fact do not tend to happen organically as teachers turn from novice to expert teachers. While novice teachers battle with implementing pedagogical knowledge and content knowledge and getting familiarised with both institutional demands and students' personal needs- inclusion is not to be seen as a matter to be dealt with later. Teaching and learning should always be inclusive.

Moreover, teachers' educators see policy and structural changes in Lithuania as a societal process that requires time and community effort and takes into consideration the contextual specifications: "Education is shaped by each country's culture, history, social and political situation and so on. It's a process and each country has to find specific ways to be inclusive, and changes take time. As Lithuania is going to follow the path of inclusive educational settings, we need to ensure that we are reflecting on our educational system and looking for opportunities to advance" (TE 1). This is similar to D. Mitchell's reminder of the importance for each country to develop its own model of inclusive education that links national traditions, values, ideologies and experiences regarding inclusion (Mitchell's, 2014). TEs too, suggested that implementing a progressive, inclusive policy into established tradition requires collective work- mutual interaction with the transformation processes of educational institutions and education system changes, while depending on competent teachers who have the willingness to improve and have a positive attitude towards inclusion and change (Sharma & Nuttal 2016). This also aligns with stressing on the ability to collaborate as one of the crucial skills for inclusive teachers. This collaboration is both horizontal and vertical, both cross-disciplinary and generational. Interestingly, contextual specifications of the nation play a huge role in how TEs understand and evaluate their own current practices, factors hindering current practices, and challenges encountered. The narrative emphasizes the complex aspects of inclusion, influenced by regional, cultural, and personal factors. It highlights education's role in fostering inclusivity, stressing the need for empathy and open-mindedness. It

also points out the significance of addressing stigmas and stereotypes to adapt to societal changes, suggesting that the effectiveness of inclusion relies on both collective societal values and individual actions.

Similarly, there are sentiments on seeing inclusion in education as a first step toward a more tolerant and empathetic society: “It's very important to have this sense of unity when it comes to looking for solutions for SEN or inclusion. When teachers see it as their role, they can move away from their own stereotypes, with both experienced and newly qualified teachers viewing it as just an advancement in education to meet societal needs, and *not* additional work and only a challenge. Parents should be involved more, with openness and professionalism without feeling stigmatised” (TE 4). TEs in this study, too, see their roles not only as preparing future teachers with knowledge and practical methods but also as negotiators and advocates of ethical ideals and everyday practices (Bradley-Levine, 2021) for inclusive education.

## **Conclusions**

To sum up, the case study reveals that TEs have varied interpretations of inclusion- all focusing on meeting diverse student needs. They act as mediators between educational policies and classroom practices, striving to equip future teachers with the skills for inclusive education. TEs emphasise methods for inclusive education, such as the importance of personalised learning and advocating for student choice in topics to enhance engagement and learning. They also highlight the role of contextualised learning, where personal experiences shape teaching strategies, promoting diverse and adaptable methods. These practices, reflecting a shift towards more personalised and inclusive education in Lithuania, underscore the need for teachers to be versatile and responsive to students' individual interests and backgrounds. Without focusing heavily on faced challenges, TEs emphasise on a collaborative approach as crucial for fostering inclusivity. This involves addressing cultural stigmas and promoting open-mindedness, underscoring the collective and individual roles in effecting meaningful change.

However, Inclusive education in Lithuania still has a lot of potential to develop. Firstly, the current heavy dependence on the basic 60-hour course, lacking a comprehensive inclusion focus across all training subjects and programs. Secondly, the approach to meeting diverse learning needs is still largely reliant on individual initiative and willingness at both university and school levels. Thirdly, the need for inclusive education in Lithuania to move beyond SEN and for discussion to include other variety of diversity-related concerns has also been mentioned.

Nevertheless, TEs view the shift towards inclusive education in Lithuania as a gradual and ongoing process which is a complex societal journey that requires

deep contextual understanding, but most importantly time and community effort. In order to overcome it, they emphasize the importance of developing a model of inclusive education that respects national traditions and values, advocating for collaborative efforts across all levels of the educational system. Despite challenges in preparing teachers for inclusive settings, there is optimism towards new educators' willingness to learn and adapt and growing curiosity for the vision and strategies for inclusive education

Furthermore, this case study highlights the role of inclusive education in fostering a more tolerant and empathetic society, emphasizing unity starting from addressing SEN. All educators are encouraged to shift perspectives, viewing inclusion as an educational advancement rather than a burden, with a call for greater parental involvement and professionalism. TEs see themselves as both instructors and advocates for inclusive practices, stressing the importance of ethical ideals in shaping future educators for a diverse educational landscape.

Finally, this investigation serves as the initial phase in a broader inquiry, aiming to explore how TEs are equipping future teachers for inclusive education at a time of educational reform. As a pilot study, responses also shed light on inclusive education in higher education and teacher training in the Lithuanian context. Follow-up inquiries have been planned around the challenges and opportunities of responding to student diversity beyond (special) learning needs, nurturing inclusive and diverse classrooms, and aligning local practices with broader European educational practices.

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## PUPILS' RIGHTS AND RESPONSIBILITIES IN CONFLICTS BETWEEN PUPILS AND TEACHERS

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**Abstract:** *This paper aims to reveal students' reactions to a conflict situation due to the nonimplementation of students' rights and duties. The data was collected by the means of a questionnaire (anonymous survey). The participants of the study were 241 pupils of a general education school (grades 5-8). The data show that conflicts between pupils and teachers are a daily occurrence. Conflicts between pupils and teachers arise from teacher's behaviour that ignores or violates pupil's rights: when the teacher explains the subject in an uninteresting way (60.2%); when teacher assigns too many tasks for pupils (58.9%); expresses negative bias towards the pupil (34.4%); teacher restricts pupil's independence (34.4%); teacher ignores the pupil's abilities (29.4%); teacher does not assist the pupil (22%); teacher discriminates against the pupil (14.9%); or teacher behaves rudely towards the pupil (13.2%). The survey revealed that pupils tend to be passive during conflicts with the teacher: 47.8% of the pupils chooses avoidance strategy, 52.3% adapt, 29.9% of the pupils chooses the strategy of indirect protest, 6.6% of the pupils chooses direct aggression tactics (saying something offensive, refusing to do the task, etc.). Correlation analysis shows that conflict is most likely to occur when the teacher penalises pupil's misbehaviour through grading, when the teacher fails to notice the pupil's efforts, and when the teacher fails to help the pupil. As the teacher is the one who is responsible for building the pupil-teacher relationship, the teacher must take the lead in fostering a relationship of dignity and respect with the pupil by exercising his/her rights and resolving conflicts in a constructive way.*

**Keywords:** *causes of conflict, conflict between pupil and teacher, means of conflict resolution, pupil's rights and duties, school.*

### Introduction

The environment influences the quality of human life, such influence is also a fundamental factor in human development. At school, a child acquires not only the knowledge and the competences of behaviour and individual subjects but also his/her values are internalised, his/her attitude towards various real-life issues is formed, and skills are developed (Kvieskienė, 2005; Kairienė, 2017).

As a school fulfills its educational objectives, it also has a duty to ensure children's rights. For instance, to create a safe, child-friendly educational



environment where children can express their views freely and without fear, to ensure that the child would be heard, to make decisions in the best interests of the child, etc.

The implementation of children's rights encompasses both, the field of children's rights and the field of pedagogy. To illustrate this, the realization of children's rights relies on establishing a connection with the child that holds educational promise and shapes the child's growth. Hence, the school bears the responsibility not solely for the child's education but also for fostering interpersonal connections, preparing them for independent living, successful, and responsible coexistence in society. The education to which every child has a right is one designed to provide the child with life skills, to strengthen the child's capacity to enjoy the full range of human rights and to promote a culture which is infused by appropriate human rights values; the goal is to empower the child by developing his or her skills, learning and other capacities, human dignity, self-esteem and self-confidence (UN Committee on the Rights of the Child, 2001). The child's readiness for independent living extends until adulthood, so it is imperative for the school to emphasize the child's comprehension of children and human rights, along with fostering the skills required to establish and sustain relationships with others (Kairienė, 2023), encompassing proficiency in conflict resolution.

Conflict is an important phenomenon for the personal experience and growth (Erikson, 2004; Piaget, 2011), notably, only the constructive conflicts are associated with personality development, while destructive ones correlate with teenager's delinquent behaviour and delinquency (Garrard & Lipsey, 2007; Runions & Shaw, 2013). Destructive pupil-teacher conflicts lead to pupils' negative attitudes towards their teacher, school, fear of school, lower academic achievements, conflict-prone and destructive behaviour as well as bullying (Roorda et al., 2011; Skalicka et al., 2015; Wang et al., 2018).

Conflict resolution is a joint action between the conflicting parties to stop the conflict and address the underlying problem: it is important to find out what are the causes of the conflict and then to apply the appropriate conflict resolution techniques and measures to address these causes. A constructive way of resolving a conflict is through compromise and cooperation (negotiation, joint problem solving, mediation). A cooperative strategy involves the following steps: 1) the person explains what he wants and why he wants it (clarification of interests); 2) the person realises that his aim is linked to the aim of the other person and that a mutual solution is needed in order to achieve both goals. He/she asks/listens to what the opponent wants and why he/she wants it (interest clarification); 3) he/she presents several options for a solution and together with the opponent considers which one is the most suitable for both parties (negotiation, compromise, compensation, satisfaction of interests). Constructive decision-making helps to

build relationships, teaches how to communicate properly, manage one's emotions, analyse and evaluate the outcome (Wilmot & Hocker, 2001).

Resolving conflict through destructive means includes employing approaches such as adapting to the situation through concessions (adaptation strategy), avoiding conflict by concealing it (avoidance strategy), or using force (combat strategy). Different types of combat actions encompass threatening through verbal aggression, intimidation or humiliation of the opponent; physical aggression to harm the opponent, e.g. hitting or damaging one's belongings; and seeking revenge if the opponent refuses to concede (Wilmot and Hocker, 2001; Čiuladienė, 2018). The major challenge is that acquiring conflict resolution skills is feasible only when both conflicting parties actively seek for a resolution. Hence, teachers should facilitate pupils in observing the conflict resolution process and encourage them to become active participants in conflicts. Conflict constitutes a natural and crucial component of a student's (self-)education (Čiuladienė, 2013; Guilherme, 2017).

Research questions: what are the rights and responsibilities of pupils that, if not fulfilled, lead to conflicts between pupils and teachers? What is the response of pupils to the non-implementation of their rights and responsibilities? The object of this study is the occurrence of conflicts due to the non-implementation of pupils' rights and responsibilities. This article aims to reveal the reactions of pupils to a conflict situation arising from the non-fulfilment of their rights and duties.

### **Methodology**

In order to identify the pupil's rights and responsibilities that, when not fulfilled, result in conflicts between students and teachers, a quantitative research method has been chosen. This method enables a thorough examination of the process associated with the phenomenon under study (Kardelis, 2007). The data has been collected through the means of a questionnaire (anonymous survey) consisting of 9 questions, 7 of which are close-ended and 2 open-ended questions. The first two questions are demographic (gender and age). The third question was aimed at finding out whether the respondent has conflicts with his/her teachers and, if so, with how many. The following questions are designed to find out the causes of the conflict. The statements were based on the rights of the child as defined in the Convention on the Rights of the Child (General Assembly, 1989) (Articles 2, 12) and the rights and duties of the pupil as defined in the Law on Education (Article 46) (Supreme Council of the Republic of Lithuania - Reconstituted Seimas, 1991). Other questions relate to the specifics of conflict resolution. A basic random sampling method was employed, wherein every element within the population has an equal likelihood of being included in the sample, requiring a complete list of the entire population to create the group (Gaižauskaitė, Mikėnė, 2014). The pupils in grades 5-8 were chosen as the

participants of the study, because pupils of this age (10-15 years old) are already entering early adolescence, and the most prominent feature of adolescence is a tendency towards conflicts (Petruilytė, 2012; Čiuladienė, 2013). Paniotto's formula was used to calculate the sample size for the study. A 5% margin of error (or 0.05), a 95% confidence level for the results, and a population size of  $N=521$  were applied. According to the calculations, the projected number of respondents for the empirical study is 227.

The survey took place in 2020 and was conducted by one of the authors. The researcher requested the permission from the administration of Vilnius X Progymnasium to conduct the research. After obtaining the consent of the school administration, an information notice about the planned study was sent to the parents of pupils in grades 5-8 via the school's electronic diary. Parents who did not agree to their child's participation in the study were asked to inform the investigators within one week. Parents of four pupils did not agree to their child's participation in the study. Tutors and teachers were contacted (via the e-diary or face-to-face) regarding the possibility of conducting the study during tutor time in the classroom. After obtaining the consent of the tutors and teachers, the pupils were approached during tutor time to ask for their consent to participate in the study. 257 pupils agreed to take part in the study and 241 questionnaires were completed. Out of all of the respondents, 53% ( $n=128$ ) of them were girls, 46% ( $n=111$ ) were boys and 1.7% ( $n=4$ ) of pupils did not indicate their gender. The study was conducted in accordance with the ethical principles of anonymity, confidentiality and voluntary participation. Participants were informed about the purpose of the study, the ethical principles of the study and all of their questions were answered. Data processing – the data was processed and analysed using the Statistical Package for Social Science (SPSS) statistical analysis software, as methods to process the data descriptive statistics and Pearson correlation analysis were chosen. Limitations of the study: only pupils from one school took part in the study, so the results cannot be generalised. It would be useful to involve teachers in the study to find out their attitudes towards conflicts with pupils, what they believe are the causes and solutions of conflicts. It would also be useful to extend the study by conducting it in other general education schools.

### **Results. 1. Student-teacher conflicts due to failure to enforce student rights and responsibilities**

Conflict is a daily occurrence at school - 42.3% of pupils say they have conflicts with one or less than a few teachers and 5.4% of pupils have conflicts with many teachers. The aim was to find out what kind of teacher's behaviour causes the conflict. Table 1 shows the teacher's behaviour in terms of ignoring or violating the rights of the pupil. The pupil's rights are presented on the basis of the Law on Education (Supreme Council of the Republic of Lithuania -

Reconstituted Seimas, 1991) and the Convention on the Rights of the Child (General Assembly, 1989). The rights of the pupil in the Law on Education (Supreme Council of the Republic of Lithuania - Reconstituted Seimas, 1991) elaborate on the provisions of Article 29 (1) of the Convention on the Rights of the Child (General Assembly, 1989) on the implementation of the aims of education. The aims of education are directly related to a child's human dignity and the realization of their rights, taking into account the child's specific developmental needs, diverse evolving capacities. This includes comprehensive nurturing of the child's full potential, fostering respect for human rights, cultivating a stronger sense of identity and affiliation, and promoting the child's socialization and interaction with others and with the environment (UN Committee on the Rights of the Child, 2001). The child's right to express their opinion, to be heard, and the right not to be discriminated against are considered fundamental principles due to the universality of their application. The concept of the Convention on the Rights of the Child (General Assembly, 1989) not only establishes conditions to ensure the content of the child's rights but also through the affirmed active status of the child, as expressed in Articles 12 and 13, obliges adults to create opportunities for the expression of child's activity, also known as the right to participation of the child (Kairienė, 2023).

According to pupils, conflicts between pupils and teachers usually arise when teachers ignore or violate pupil's rights. Pupils highlighted teachers' behaviour when the teacher assigns too many tasks (the pupil cannot keep up, cannot complete them all); ignores the pupil's abilities (does not assign individual tasks, does not pay attention to the pupil's progress); explains the subject in an uninteresting way (teaches only textbook material, does not provide clear examples); does not assist the pupil when the pupil is struggling with learning or experiencing communication problems; expresses negative bias towards the pupil (does not acknowledge the pupil's efforts); restricts pupil's independence (does not allow the pupil to make decisions on their own, gives directives on what the student should do, how they should behave, without considering the student's opinion); behaves rudely towards the pupil (insults, nicknames, threatens, imposes physical punishments); and so on. It should also be noted that teachers discriminate against pupils when they criticise a pupil's appearance (hairstyle, clothes, etc.). The research results indicate that teachers, through their actions, ignore or violate the rights of students, thereby limiting their ability to develop fully and educational aims to be achieved. The fact that inappropriate teacher's behavior causes conflicts reflects the awareness of children and their unwillingness to tolerate violations of their rights.

Table 1 *The behavior of teachers that leads to conflict (%) (made by authors)*

Pupil's rights	Teacher's behaviour	Frequency	
		Infrequent	Frequent
According to one's abilities and needs, to learn in school, self-study, and acquire education, qualifications (Supreme Council of the Republic of Lithuania - Reconstituted Seimas, 1991)	The teacher assigns too many tasks (the pupil can't keep up, cannot complete them all).	33,2	25,7
	The teacher ignores the pupil's abilities (does not assign individual tasks, does not pay attention to the pupil's progress).	19,9	9,5
Receive a quality education (Supreme Council of the Republic of Lithuania - Reconstituted Seimas, 1991)	The teacher explains the subject in an uninteresting way (teaches only textbook material, does not provide clear examples).	46,1	14,1
	The teacher does not assist the pupil when the pupil is struggling with learning or experiencing communication problems.	15,4	6,6
Learn in an environment based on mutual respect, psychologically, spiritually, and physically safe, and have a learning workload and environment that meet hygiene requirements (Supreme Council of the Republic of Lithuania - Reconstituted Seimas, 1991)	The teacher is unable to resolve his/her and the pupil's interpersonal conflict properly (the conflict persists, and hostility arises between the pupil and the teacher).	15,4	8,3
	The teacher behaves rudely towards the pupil (insults, nicknames, threatens, imposes physical punishments).	9,5	3,7
	The teacher is undisciplined (arrives late, talks on the phone during the lesson).	13,7	5,8
An unbiased assessment of his/her learning achievements (Supreme Council of the Republic of Lithuania - Reconstituted Seimas, 1991)	The teacher expresses negative bias towards the pupil (does not acknowledge the pupil's efforts).	25,3	9,1
	The teacher penalises pupil's misbehaviour through grading.	11,2	10,4
Expressing one's opinion and being heard (General Assembly, 1989)	The teacher restricts pupil's independence (does not allow the pupil to make decisions on their own, gives directives on what the student should do, how they should behave, without considering the student's opinion).	20,7	13,7
Non-discrimination (General Assembly, 1989)	The teacher criticizes the student's appearance (hairstyle, clothing, etc.).	9,5	5,4

The implementation of educational aims is primarily the responsibility of parents, who create opportunities for their child to participate in the education system, and the state, which establishes a quality education system that meets the developmental needs and increasing abilities of the child, ensuring the human dignity of each child and the realization of their rights. The achievement of educational aims depends not only on the functioning of the education system but also on the efforts of the pupils, which are primarily related to the fulfillment of their responsibilities. The study aimed to identify which neglected responsibilities of the pupils lead to conflicts with teachers. The results indicate that students do not adhere to behavioral rules, as they are insincere with the teachers — pupils tend to hide something or not express their thoughts (50.2% of pupils admitted in the survey that they do this both frequently and infrequently), do not appreciate the efforts of the teacher, and do not notice positive qualities of the teacher (21.6% of pupils admitted in the survey that they do this both frequently and infrequently). Some students are unwilling to fulfill their duty to complete assigned tasks and do not put in enough effort to study — they chat during lessons (23.3% of pupils admitted in the survey that they do this both frequently and infrequently). The pupils' duty to attend school is also not always successfully fulfilled—pupils skip classes without a justifiable reason (7.1% of pupils admitted in the survey that they do this both frequently and infrequently). The duty of the pupils to respect teachers and other members of the school community, not to violate their rights and legitimate interests, is also not always fulfilled – pupils harass the teacher – annoy, disrupt, and disobey (2.9% of pupils admitted in the survey that they do this both frequently and infrequently).

The Convention on the Rights of the Child outlines only the rights of the child, not the duties. However, this does not mean that a child, until reaching adulthood and while still under the protection of child rights, does not have any responsibilities. The child's duties are essential for preparing them for an independent life, but the child's ability to fulfill these duties depends on their maturity, abilities, comprehension, while the content of these duties depends on the child's environment. The analysis of the child's duties is related to the realization of educational aims, but the implementation of educational aims depends on the efforts of teachers, their ability to explain to the child why fulfilling such duties is important as well as beneficial. It was mentioned that children are not always sincere with teachers, and they do not always appreciate teachers' efforts. The development of a relationship between a child and an adult is the responsibility of the adult, in this case – it is the responsibility of a professional educator who knows how to build a relationship with a pupil, and is capable to consider the child's age, development, and individual characteristics. However, the fact that some pupils are insincere with the teacher and do not appreciate their efforts, suggests that pupils may not always trust the teacher due to the negative experiences that they had. This assumption could be vindicated

with the data of this study, which proves that teachers tend to ignore or violate pupils' rights. It was also mentioned that pupils do not put in enough effort to study or skip classes without a valid reason. Such instances indicate that pupils lack motivation to study, therefore, this could derive from some of the actions of the teachers. As an example, it is plausible to claim that if a teacher assigns too many tasks, ignores a pupil's abilities, does not appreciate a pupil's progress, explains the subject in an uninteresting manner, does not provide clear examples, does not assist the pupil when they are struggling, does not acknowledge the pupil's efforts, restricts their independence, a pupil's motivation to study could be diminished.

## **Results. 2. Pupils' responses to the neglect of their rights and responsibilities**

The study showed that students tend to be passive during a conflict with a teacher. 26.1% of the respondents answered that they choose an avoidance strategy frequently, while 18.7% of respondents – infrequently. Conflict avoidance strategies are depicted through pupils' actions, as they try not to think about the conflict situation with the teacher (they try to forget it). Conflict with a teacher also leads to absenteeism, 3.3% of the pupils skip lessons frequently, whilst 4.6% - infrequently. 20.3% of pupils tend to be condescending towards the teacher frequently, on the other hand, 32% - respond in this manner infrequently. A fifth of the respondents perceive such strategies as a situational solution, and given the opportunity, they will take initiative to prove their point to the teacher. Based on the research results, one-third of the pupils (29.9% of respondents both frequently and infrequently) choose an indirect protest strategy - they complain about the teacher to others, 6.6% of respondents (both frequently and infrequently) disrupt the teacher from conducting the lesson by chatting and commenting. Survey also shows that one tenth of the respondents raise their voice (both frequently and infrequently) when they are in conflict with the teacher (11.6% of the respondents), 7.9% reply with something offensive, 6.6% refuse to do the teacher's assignments.

The relationship between pupils'/teachers' behavior (non-compliance with rights and duties) and the student's response to a conflict situation was analyzed (Table 2).

Correlational analysis confirms the relationship: collaboration requires effort and sincerity to reveal the participants' attitudes towards the conflict situation, possibilities for a conflict resolution were also discussed. It has also been determined that when pupils do not fulfill their duty to respect the teacher (harass the teacher – annoys, disrupts, disobeys), pupils tend to choose avoidance (avoids contact) or direct confrontation strategies (disturbs the conduct of the class, replies with something offensive).

**Table 2 Relationship between pupils'/teachers' behaviour (non-compliance with the rights and duties) and student response to conflict situation (values given if  $p \leq 0.05$ ) (made by authors)**

		Pupil's response to conflict situation									
		Both parties are talking, discussing possible solutions	Condescending	Waiting for a more favorable opportunity to win the conflict	Try to forget about the conflict.	Avoids contact with the teacher	Raise their voice	Reply with something offensive	Disobey	Complains about the teacher	Disrupt the teacher from conducting the lesson
Pupil's behaviour	Insincere	-0,171	-	0,194	0,165	0,219	-	0,144	-	-	-
	Do not appreciate the efforts of the teacher	-	-	0,129	-	-	0,169	0,160	-	-	-
	Does not put in effort	-0,143	-	0,215	-	0,142	0,182	0,213	0,276	-	0,286
	Skips classes	-	-	0,215	-	0,142	0,147	0,145	0,180	-	0,212
	Abuse the teacher	-	-	0,273	-	0,366	0,240	0,386	0,301	-	0,388
Teacher's behaviour	Assign too many tasks	-	-	0,235	-	0,206	0,209	0,179	0,169	0,196	0,185
	Does not assign individual tasks	-	-	0,211	-	0,237	0,164	-	0,162	0,144	0,263
	Does not provide clear examples	-	-	0,193	-	0,194	0,147	0,133	0,240	-	0,265
	Does not assist the pupil	-	-	0,206	-	0,286	-	-	0,162	0,159	-
	Does not acknowledge pupil's efforts	-	-	0,283	-	0,289	0,165	0,144	0,235	0,254	0,192
	Penalises pupil through grading	-	-	0,293	-	0,201	0,229	0,229	0,197	-	0,129
	Restricts pupil's independence	-	-	0,208	-	0,156	0,195	-	0,127	0,228	-



Conflicts caused by the failure to implement pupils' rights are linked to pupils' fight and flight strategies. Correlational analysis shows that conflict is most likely to occur when the teacher penalises pupil's misbehaviour through grading, when the teacher fails to acknowledge pupil's efforts, and when the teacher does not assist the pupil. In addition, the pupil's reaction to such situations is not constructive - he/she tends to opt for avoidance, i.e. he/she postpones the conflict rather than resolves it (waits for a more favorable opportunity to win the conflict/avoids contact with the teacher).

Situations, when teacher fails to support pupil learning-wise (does not provide clear examples or individual tasks) also lack constructiveness. In such situations, the pupils tend to use indirect aggression by disrupting the teacher from conducting the lesson. This reaction is unlikely to resolve the conflict, on the contrary it is more likely to escalate it. It is worth noting that pupils' conflicts with teachers caused by the non-fulfillment of pupils' rights does not correlate with the pupils' cooperative or adaptive response to conflict.

## **Discussion**

This study aimed to find out how teachers' nonimplementation of pupils' rights can be linked to teachers' conflictual interactions with pupils. Although the study was carried out in only one educational institution, the results follow the trend of student-teacher conflicts, while approximately every second child experience conflicts with teachers, some pupils struggle to resolve these conflicts (Wang et al., 2018, Duckworth et al., 2019).

Within the paradigm of conflict theory, the course of a conflict is determined by the participants' ability to resolve the conflict. In a conflict, two parties are involved, where one's reaction triggers a counter-reaction. Therefore, constructive efforts from both sides to resolve the conflict is essential for a positive outcome (Hakvoort, 2010; Hendrickx et al, 2016). Cooperation during a conflict involves expressing the opinions and positions of both parties, active listening to each other, generating proposals based on situational analysis, and reaching agreement on an acceptable solution. However, the relationship between a teacher and a student is not equal – teachers have a position of power that they leverage (Blunk et al., 2017; Chen et al., 2018; Čiuladienė & Kairienė, 2017; 2018). Hence, if teachers do not initiate cooperation, the conflict will not be resolved constructively. Nevertheless, the data from this study indicate that in conflicts with teachers, pupils predominantly adopt an adaptive and avoidance approach. This suggests that teachers, in resolving conflicts with students, employ either a confrontational or avoidance strategy as well. The results of this study align with other researchers' findings, illustrating that in the educational reality, when a confrontational strategy is implemented, it is usually driven by the demonstration of teacher's authority (Hendrickx et al., 2016; Blunk et al., 2017; Chen et al.,

2018). The need for the development of conflict resolution competence among Lithuanian teachers is highlighted by the following data: a quarter of teachers struggle to manage anger (Navaitienė & Jaruševičienė, 2018), a quarter of students report that teachers hurt them emotionally and insult them (Martišauskienė, Vaičekauskienė, 2016); the opinion of more than a third of parents is that their children's motivation to learn diminish due to disagreements with teachers (Jegelevičienė, Merfeldaitė, Railienė, 2016).

Correlation analysis shows that cooperation is not inherent when pupils' rights are ignored. This result suggests that future conflicts, which teachers describe as "due to a sudden change in student behaviour", are a manifestation of these simmering conflicts that have been hidden for some time due to a lack of power on the part of the students (Čiuladienė & Kairienė, 2017; 2018). A longitudinal study is needed to empirically confirm this assumption. On the other hand, theoretical insights are certainly not lacking in the scientific literature: constructive conflict resolution is a prerequisite for maintaining openness, respect and trust (Runions and Shaw, 2013; Wang et al., 2018). Mediation, for example, might be implemented at school setting as an useful resource to practice the ability to resolve conflict constructively (Hargreaves & Elhawary, 2019; Sellman, 2011). By developing effective conflict management skills the relationships are enhance, smooth interactions are nourished.

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# TEACHERS' MOTIVATIONS, BELIEFS, AND EXPECTATIONS REGARDING MORAL EDUCATION IN UPPER SECONDARY EDUCATION

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**Abstract.** *This study explored high school teachers' motivations and preferences regarding adolescents' moral education in the context of the assessment of the newly developed program 'e-TAP+' for virtue education in Grades 10 to 12 in Latvia. The program comprises four modules: personal flourishing, flourishing relationships, societal flourishing, and digital flourishing. The research questions guiding the research were: Which aspects of moral education at high school were most important for teachers, as evidenced by the topics they chose to pilot in their classes? What were teachers' motivations for and expectations of participating in the evaluation of the virtue education program? This mixed-method survey research used an online questionnaire completed by 107 secondary school teachers from all regions of Latvia. In December 2023 – January 2024 teachers volunteered to participate in the piloting of the program, chose their preferred topics, and provided open-ended feedback on their choices and motivations. A total of 225 topics were chosen (90 in Grade 10, 81 in Grade 11, and 54 in Grade 12). Preliminary findings suggest that participants' overall opinion about the program was very positive. Teachers' main motivations were (1) the availability of quality materials for classroom discussion about virtues and values, and (2) the topicality of the program's themes. Teachers in Grade 10 prioritized topics related with flourishing relationships (n=29, 32%), teachers in Grade 11 had a slightly bigger interest in personality than in relationships (n=28, 34% and n=24, 30%, respectively), and teachers in Grade 12 prioritized personality flourishing (n=20, 37%). The results will be valuable for other high*

*school teachers and leaders, organizers of professional development courses, policymakers and other education authorities, and moral education researchers.*

**Keywords:** *program assessment, upper secondary education, teachers' motivation, virtue education.*

## Introduction

Late adolescence (15-18) is characterized by new abilities of metacognition and abstract thinking, which trigger exploration of identity, moral reasoning, and the establishment of a new belief system (Padilla-Walker, 2016). Consequently, young people in these ages experience a heightened openness to diverse perspectives and a need to search for meaning in life (McNamara Barry & Abo-Zena, 2014). This process, known as the moratorium stage, positively correlates with open mindedness and curiosity (Schwartz et al., 2013).

Identity development during late adolescence is nurtured within respectful and autonomous learning environments that offer emotional support for students to express and reflect on their experiences (Lapsley, 2010; Magolda & Taylor, 2015). This aligns with the growing recognition of the importance of fostering open-minded moral inquiry in high schools through a dialogical approach, which supports the identity formation of high school students (Keiša & Fernández González, 2022)

The topic of moral education at school is a current subject of debate in recent scientific literature (e.g., OECD, 2021; Singh, 2019; Stevenson, 2022; De Ruyter et al., 2022). Similarly, in Latvia there are controversial and overlapping interpretations of what constitutes moral education. This complexity partly stems from Latvia's heterogeneous cultural reality, built on the successive exposure to socialist, post-socialist, and then liberal and neo-liberal moral-values systems. (Maslo et al., 2023). Currently, the need for virtue education (in Latvian – *tikumiskā audzināšana*) is theoretically guaranteed by the State in the article 10 of the Education Law (Saeima, 1997), which stipulates that that the education system shall ensure the moral development of the learner in accordance with the values enshrined and protected in the Constitution of the Republic of Latvia, as well as in the Guidelines for moral education (Cabinet of Ministers, 2016). Nevertheless, the specific method and timing for delivering moral education at schools remain unclear. The recently reformed national education curriculum (Skola2030, 2017) no longer includes a distinct subject labelled 'Ethics' in primary or secondary general education. Instead, ethics is now integrated into the learning area 'Social sciences' within the basic education curriculum, with no equivalent integration in the secondary general education standard. As a result, currently the primary place for pursuing moral education and fostering virtues in secondary education is during the weekly homeroom lessons. It should be noted that the most recent official program outlining topics for these homeroom lessons

was developed already eight years ago by the National Centre for Education (2016).

These challenges for moral education are being addressed by one of the activities of a recent project (2022-2024) implemented at the University of Latvia. A moral education program ('e-TAP+') for grades 10 to 12, based on personalist virtue ethics (Fernández González, 2019) and addressing existential questions mostly in a dialogic form, was elaborated and is being piloted in 67 high schools in Latvia. The goal of this study was to explore high school teachers' motivations and preferences regarding youngsters' moral education, in the context of the piloting of this program. The research questions guiding the inquiry were:

RQ1: Which aspects of moral education at high school were most important for teachers, as evidenced by the topics they chose to pilot in their classes?

RQ2: What were teachers' motivations for and expectations when getting involved in the validation of the virtue education program?

## Methodology

The program offers four modules for each Grade (10-12): 'Personal flourishing personalities', 'Flourishing relationships', 'Societal flourishing and 'Flourishing in the digital world'. Each module focuses on a specific topic per grade (see Table 1), which is developed further in three 40- minute lessons.

*Table 1 Modules and topics of the program (compiled by authors)*

Module	Module topic
<i>Grade 10</i>	
Flourishing personalities	Who am I? What am I like?
Flourishing relationships	With whom am I? (non-chosen relationships)
Flourishing society	"Me" within society, the world and the universe
Flourishing in digital world	"Me" in the digital world
<i>Grade 11</i>	
Flourishing personalities	What do I want to be like?
Flourishing relationships	What am I like and what do I want to be like in relationships?
Flourishing society	Relationships, society, and justice
Flourishing in digital world	Growth in the digital world
<i>Grade 12</i>	
Flourishing personalities	Why do I exist? In search for meaning and happiness
Flourishing relationships	Who would I like to be with? (chosen relationships)
Flourishing society	The local and the global
Flourishing in digital world	Meaning, relations and globalisation on the internet

### *Research design, instruments, and methods*

This exploratory study employed a mixed-methods approach using a survey research design. An online questionnaire with closed and open questions was used for data collection. The questionnaire had three sections: in section 1 participants

were asked to select the topics to pilot in their classes among the 36 topics offered. The second section contained demographic questions about the location and size of the school, participants' seniority, and the topics they taught. The last section included four open questions regarding what motivated their participation in the project, their motivations, and their expectations. The questionnaire was available online (Microsoft form).

Data collection happened from December 15, 2023, till January 15, 2024. The selection criteria for participants were: 1) Teachers (either homeroom teachers or subject teachers); 2) working in secondary schools and in vocational training institutions; 3) working with the appropriate age group (pupils with 16-19 years of age); 4) voluntary participation. Invitation to participate in the project was disseminated in the social media and through personal emails sent to the heads of all education authorities Latvian cities and districts (n=43), and to all directors of the secondary and vocational education schools in Latvia (n=270).

#### *Participant teachers and schools*

Overall, 107 teachers participated in the research. 92 of them (86%) were homeroom teachers. As regards their teaching areas, 23% taught languages, 21% - cultural awareness and self-expression, 16% - natural sciences, 13% - social and civic education, 8% - mathematics, 4% - technology, 2% - health and physical activities, 3% were career counsellor, 4% were only homeroom teachers, and 4% worked in school administration. Teachers' length of service ranged from 2 to 40 years. The average seniority was 23.5 years (*Mode* = 32, 34; *Median* = 26), and only 6.5% of participants (n=7) had less than 5 years of service.

Regarding the geographical distribution of participants, most of them were from the regions of Latgale (30.8%) and Riga and its region (28%). There were also participants from Vidzeme (20.6%), Kurzeme (13.1%) and Zemgale (7.5%). 44.9% of teachers were from schools in one of the ten state cities (over 22,000 residents), 45.8% from other towns (at least 2000 residents) and 9.3% from school villages.

A total of 67 schools participated in the research. Most of schools had only one teacher participating (n=46, 69%). 9 schools had 2 teachers, 9 schools – 3 teachers, 2 schools – 4 teachers and 1 school – 8 teachers. Schools size was very diverse. Some schools had around 100 pupils, while others had over 2000. The average size was around 700 students. The most often represented school size was under 200 students (16% of respondents), 700-800 students (11%) and 200-300 and 1100-1200 (11%).

#### *Data processing and analysis*

The primary data were collected in an Excel file containing participants' choices about the topics they intend to pilot in their classes, as well as their answers to the 4 open questions (1580 words).

Quantitative analysis was done using SPSS 22 for descriptive analysis of frequencies and difference analysis ( $\chi^2$  test), and MS Excel (pivot tables). The



Cronbach’s Alpha test indicated an acceptable reliability of the data set ( $\alpha = 0.625$ ). For making sense of the qualitative data, thematic analysis was implemented. First the researchers read all participants’ comments, looking for themes and relevant quotations revealing participants’ motivations and expectations, and structured the information. Then, for the initial thematic structure, artificial intelligence (ChatGPT 3.5) was used, using the prompts “what motivations respondents expressed in the text? and “what were the expectations of respondents?”. A set of 10 motivations and 10 expectations was produced by the computer. Researchers jointly crosschecked and discussed the output with their own observations for ensuring reliability of the results, deciding the final items to be included in the structure of the results.

### Results and interpretation

**RQ1: Which aspects of moral education at high school were most important for teachers, as evidenced by the topics they chose to pilot in their classes?**

Overall, 225 topics were chosen: 90 in Grade 10, 81 in Grade 11 and 54 in Grade 12 (see Figure 1). 37 teachers chose topics only from Grade 10, 32 teachers – only from Grade 11, and 22 teachers – only from Grade 12; 16 teachers chose lesson topics from different grades. Regarding the number of topics chosen by teacher, 55 teachers chose 1 topic, 25 teachers – 2 topics, 17 teachers – 3 topics, 5 teachers – 4 topics, and 5 teachers – between 6 and 12 topics.

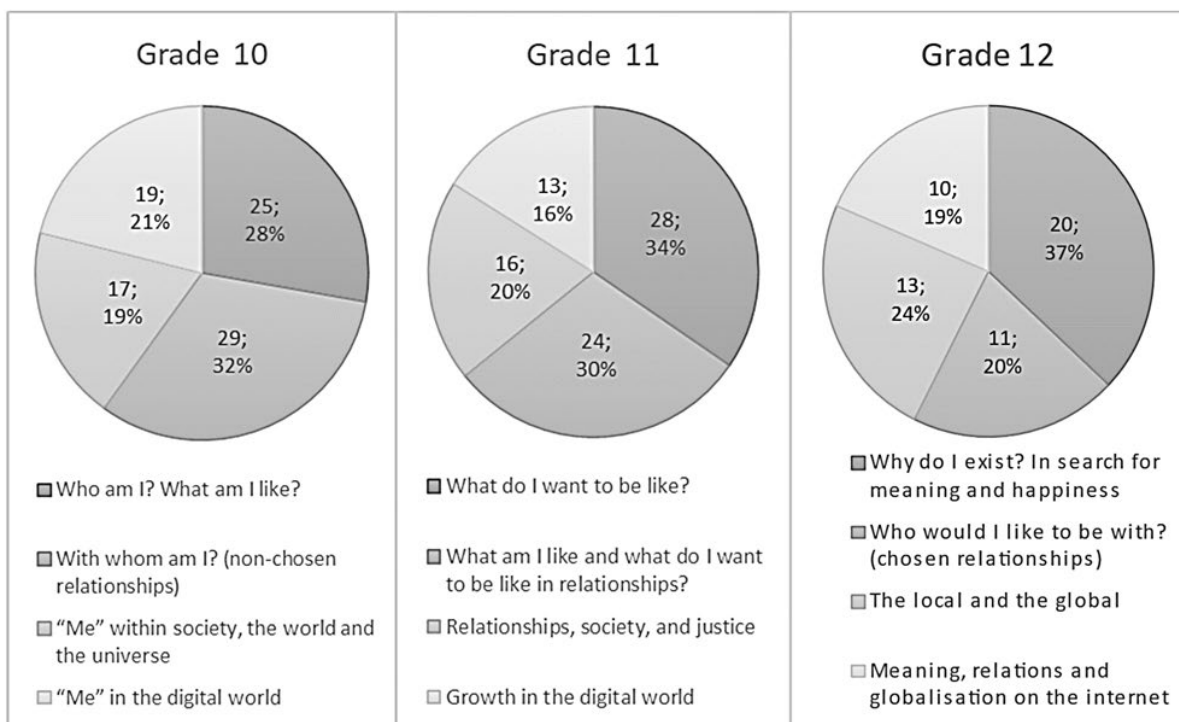


Figure1 Choice of the topics (made by authors)

A chi-square test of independence showed that there was no significant association between grade (10, 11 and 12) and chosen modules ( $\chi^2$  (10, N = 255) = 3.85,  $p > .05$ ). Overall, the personality modules were chosen most often (73 times) and had a gradual increase (28% in Grade 10, 34% in Grade 11 and 37% in Grade 12). The relationship modules were the second most popular (64 times) but showed a gradual decrease across the grades (from 32% in Grade 10 to 30% in Grade 11 and only 20% in Grade 12). Teachers chose less often topics related to global society (46 times) and to digital life (42 times), which nevertheless are very topical nowadays (Rubene, 2018), and more often related to students' personality and interaction with others.

Teachers' choice of topics on digital issues was comparatively small. This differs from a previous study capturing student teachers' preferences about the same program (Fernández González et al., 2023), in which it was found that student teachers were more likely to choose topics related to digital life. The different approach of the teachers in the current study indicates that for them the human aspect of education (personal experiences and self-understanding) is more important or at least as important as the ability to adapt to the challenges of new technologies. A harmonious and holistic values education in the future will obviously have to balance these two dimensions (human and technological). This is also one of the goals of the moral education program e-TAP+ for secondary schools.

Teachers in Grade 10 prioritized topics related with relationships (n=29, 32%). This priority could be related to teachers' awareness of pupils' need to create a new group of friends when starting secondary education. Teachers in Grade 11 had a slightly higher interest in personality topics than in relationship topics (n=28, 34% and n=24, 30%, respectively), which could be due to their perception of pupils' need for a better self-knowledge, as the new national curriculum requires Grade 11 students to choose subjects to study in depth in secondary school with a view to their future career choice (career issues are integrated into the curriculum). Teachers in Grade 12 prioritized the personality topics (n=20, 37%), probably due to the fact that at the end of secondary education, the search for happiness and meaning in life are topical issues for pupils. Overall, in all 3 secondary school grades (10, 11 and 12), teachers' choices indicated an increasing interest in topics related to human self-understanding. These include questions about the meaning of life, the value of the person, temperament and character, the problem of suffering, and existential issues.

Four teacher age group were created for exploring eventual differences in the choice of topics by seniority group: group 1 = 2-10 years of seniority, group 2 = 11-20 years, group 3 = 21-30 years and group 4 = 31-40 years. Using  $\chi^2$  test it was found that there was a statistically significant difference by seniority group regarding the topic 10.1. – *Who am I? What am I like?* ( $\chi^2$  (3, N = 107) = 8.37,  $p = .039$ ). This topic was chosen more often by group 4 than by the other groups. It

can be assumed that experienced teachers are more aware of the current educational situation, in which there is relatively smaller focus on values (philosophy, ethics, history of religions) in secondary schools, and that they therefore seek to compensate for this lack with the choice of appropriate topics for homeroom lessons.

Other (statistically non-significant) differences were found. Seniority group 3 (21-30 years) chose less often (n=1, 3.7%) the topic 11.2. - *What am I like and what do I want to be like in relationships?* than group 1 (n=6, 27%), group 2 (n=5, 28%) and group 4 (n=12, 30%). Seniority group 3 chose less often (n=4, 15%) the topic 10.2 – *With whom am I? (non-chosen relationships)* than group 2 (n=8, 44%). And seniority group 3 chose significantly more often (n=9, 33%) the topic 12.1 – *Why do I exist? In search for meaning and happiness* than group 4 (n=4, 10%).

As a limitation of the study, it should be noted that the assumption was made that the choices of topics denoted teachers' preferences. However, it is possible that in some cases teachers chose the topics after consultation with their pupils, not only based on their own preferences.

***RQ2: What were teachers' motivations for and expectations when getting involved in the validation of the virtue education program?***

Participants comments indicated a range of positive attitudes towards the educational materials and a genuine interest in improving their teaching and learning experience. The terms 'materials' or 'resources' were mentioned 64 times, and the term 'interest' or its variants (interested, interesting) was mentioned 61 times. The motivations for participating in the project included the interest in the topics covered by the program materials, which address important societal and educational issues (17 times), the need for additional teaching materials, lesson plans, and resources (8 times), and a desire to improve their teaching methods and provide better homeroom lessons (8 times). Several respondents appreciated the quality and preparation of the materials of the program (19 occurrences), and some respondents were just curious about trying something new (10 times). The motivations also included the belief that the materials and topics would be valuable and relevant for students (7 times), and the willingness to support this concrete educational initiative (3 times). Some participants mentioned previous positive experiences with the validation of similar materials for grades 1 to 9 (5 occurrences).

As regards participants' expectations, they expected the materials to be of high quality, practical and easy to integrate into their teaching (4 times). Some participants expressed interest in taking part in professional development, including workshops or training about the learning opportunities that the materials could provide (3 respondents). A few respondents expressed a willingness to collaborate with other teachers in their educational community (2 respondents).

Expectations also included materials that would engage students and topics that would stimulate their interest and understanding. Respondents also expected clear communication regarding the implementation of the piloting and the feedback to be given by them (3 times), and the desire of receiving insights into what worked well in other schools (3 times). These expectations collectively reflect a desire for effective, relevant, and supportive educational materials that contribute to the professional development of teachers and to positive learning experiences for students.

## Conclusions

After the COVID pandemic, teachers often experience difficulties to reinvent a communicative school culture. The research findings revealed that the aspects of moral education at high school which were most important for teachers were related to pupils' personality (self-knowledge, self-value) and to friendly relationships peers and family members. Teachers' main motivations for participating in the validation of the virtue education program were the practical teaching materials and a willingness to improve their teaching practices. They expected collaborating with colleagues and exchanging experiences about what worked well in other schools in the field of moral education.

The results of this study may be useful for other high school teachers and school leaders, organizers of teachers' continuous professional development courses, educational policy makers and other educational authorities as well as for moral education researchers.

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## MOTIVATING ROMA CHILDREN TO LEARN: AN ANALYSIS OF TEACHERS' EXPERIENCES

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**Abstract.** *A child's motivation to learn is one of the most important factors in planning, organising, implementing, and achieving the child's learning outcomes. The aim of this article is to reveal the motivation of Roma children to learn, based on the experience of educators working with Roma children. The type of qualitative research was chosen for the study, the research was collected using a semi-structured interview method, and the content analysis method was used to analyse the data. The research was carried out in accordance with the principles of research ethics: confidentiality, anonymity, and voluntary participation in the research. The research question: how do teachers motivate Roma children to learn? The study involved 21 teachers with experience of teaching Roma children.*

*The study identified that the motivation of a Roma child to learn is influenced on the one hand by the teacher's efforts to create an educational environment that motivates the child and meets the individual needs of Roma children, and on the other hand by the efforts of teachers to involve parents in the child's educational process by encouraging and assisting parents to create a learning-friendly environment at home.*

*The study reveals that when creating a motivating educational environment in the classroom, it is important for the teacher to accept the child as they are, to create a warm, respectful, equal relationship with the child, to interest the child, to use various incentives to emphasize the child's success, to differentiate and personalize activities, and to respond to the child's individual needs. When working with Roma children, it is important to do as many tasks as possible in the classroom, to enable them to do their homework at school and to use other pupils in the classroom to help motivate Roma children to learn and to overcome learning difficulties. The results of the study show that teachers' efforts to involve parents in their child's education by encouraging and helping parents to create a learning environment at home is important to help Roma children to understand the meaning of learning, to show the benefits of learning*

*now and in the child's future perspective. The study reveals that cooperation between parents and teachers, a shared approach to the child's learning, and a common understanding of what is required of the child are important for the child's motivation.*

**Keywords:** *learning motivation, parents, Roma children, teacher.*

## **Introduction**

According to the data from the population census in Lithuania on 1 January, 2021, 84.6 percent of the population were Lithuanians. The Roma people constitute one of the smallest ethnic groups, making up about 0.08 percent of Lithuania's population. The number of Roma people has been steadily decreasing – in 1989, there were 2718 Roma living in Lithuania, in 2002 – 2571, in 2011 – 2115, and in 2021 – 2251. The majority of Roma people reside in Vilnius city, forming 24.3 percent of the Roma population living in Lithuania (Department of National Minorities under the Government of the Republic of Lithuania, 2021).

Since 2015, the Department of National Minorities under the Government of the Republic of Lithuania has been responsible for various national minority issues, including those related to the Roma community. From its first years of operation, the department plans its activities according to annual or strategic plans, which include addressing issues related to the integration of Roma into Lithuanian society. Special attention is given to the inclusion of individuals of Roma ethnicity in the education system: improving the general education of Roma children in pre-school, pre-primary, primary, and non-formal education, as well as enhancing the general education of adult individuals of Roma ethnicity (Vilnius City Municipal Council, 2020).

Prior researchers have found that Roma families experience social, economic, and cultural exclusion, leading to educational challenges for Roma children. Factors such as unfavourable social, economic, and cultural conditions, as well as pre-existing negative attitudes within the community, parents, or caregivers towards education, contribute to these challenges. These barriers predispose children to a lack of motivation for learning and absenteeism. The identified factors, acting as both causes and consequences, result in learning losses, lack of progress, and ultimately, dropout from the education system (Survutaite, 2023).

The inclusion of Roma children in education is a topical issue not only in Lithuania, but also in other European countries. The issue of training and education of Roma is one of the many themes that resonate in our society and this issue is addressed on a global scale (Kováčová, 2015). The main category of causes is represented by the socio-familial factors, namely: the negative attitude of the parents towards the school, especially the Roma people (Pescaru, 2018). Roma pupils enrolled in regular schools are reportedly taught an abridged curriculum and are often automatically passed from grade to grade even if they have not acquired basic literacy in the early years of primary school. This thus leads to high primary school drop-out rates (Macura & Dimitrijević, 2016). Some

teachers suggest that Roma people do not value education and that Roma children have negative attitudes towards school (Peček & Munda, 2015).

The analysis of the research shows that strengthening the motivation of Roma children to learn is important for their inclusion in the education system. Motivation is a prerequisite for a child's engagement in the learning process (Saeed & Zyngier, 2012). I. Reece & S. Walker (2007) and R. Berns (2009) stress that motivation to learn is one of the most important components that influence students' educational success. A child's motivation to learn is influenced not only by the educational environment of the school, but also by the family's attitude towards the child's participation in the education system and the cooperation with the school in motivating the child to learn (Astrauskaitė, 2008). Therefore, it is relevant to study and analyse how to motivate Roma children to learn and to help Roma parents and children understand the importance of learning.

Research object of this paper – fostering and supporting the learning motivation of Roma pupils in general education schools. Research question: how do teachers motivate Roma children to learn? Research goal – to reveal the motivation for learning among Roma children, based on the experience of educators working with Roma students.

### **Research methodology**

The type of research chosen for the study is qualitative and the data is collected through semi-structured interviews. The main goal of the qualitative interview process is to obtain data that is as broad and open as possible, reflecting the research participant's perspective, and revealing the purpose of the research (Gaižauskaitė & Valavičienė, 2016). During the interview, the researcher delves into the opinions, attitudes, experiences, motives, feelings, etc. of the research participants. The structure of the semi-structured questionnaire is flexible and allows to manage the interview process by changing the wording of the questions, the sequence of the questions, and by asking additional questions, etc. as needed. The responses of the participants were transcribed on the same day after the interview. Separate coded files were created on the computer for each participant (coding the participants M1, M2, M3....M21), without disclosing personal information.

The method of content analysis was chosen to examine the collected data. The analysed data comprises texts obtained from the interviews. These texts underwent multiple readings to achieve a more thorough comprehension of the respondents' answers, emphasizing crucial aspects that delineate the text into different sections. The information acquired through the semi-structured interviews is organized using pre-prepared questions: statements are categorized into subcategories, and subcategories are then integrated into broader categories.



The research employed a purposive sampling type for participant selection. The criteria for selecting participants were: 1) educational work with Roma children; 2) a minimum of 1 year of educational experience working with Roma children. A total of 21 teachers participated in the study.

The research was carried out in accordance with the principles of research ethics: confidentiality, anonymity, and voluntary participation in the research.

Limitations of the study: the study was carried out within the boundaries of the Vilnius City Municipality, thus, the findings of the study reflect the situation of Roma children's participation in the education system in Vilnius City.

The results of the research presented in this paper are part of a study on the participation of Roma children in the education system in Vilnius City, funded by Vilnius City Municipality (No. 2ST-5 (17.19 E-451)).

### Research results

After analysing teachers' experiences regarding motivating Roma children to study, two categories were identified: the educational environment created by the teacher that motivates the child to study, and parental involvement in the child's educational process (Figure 1).

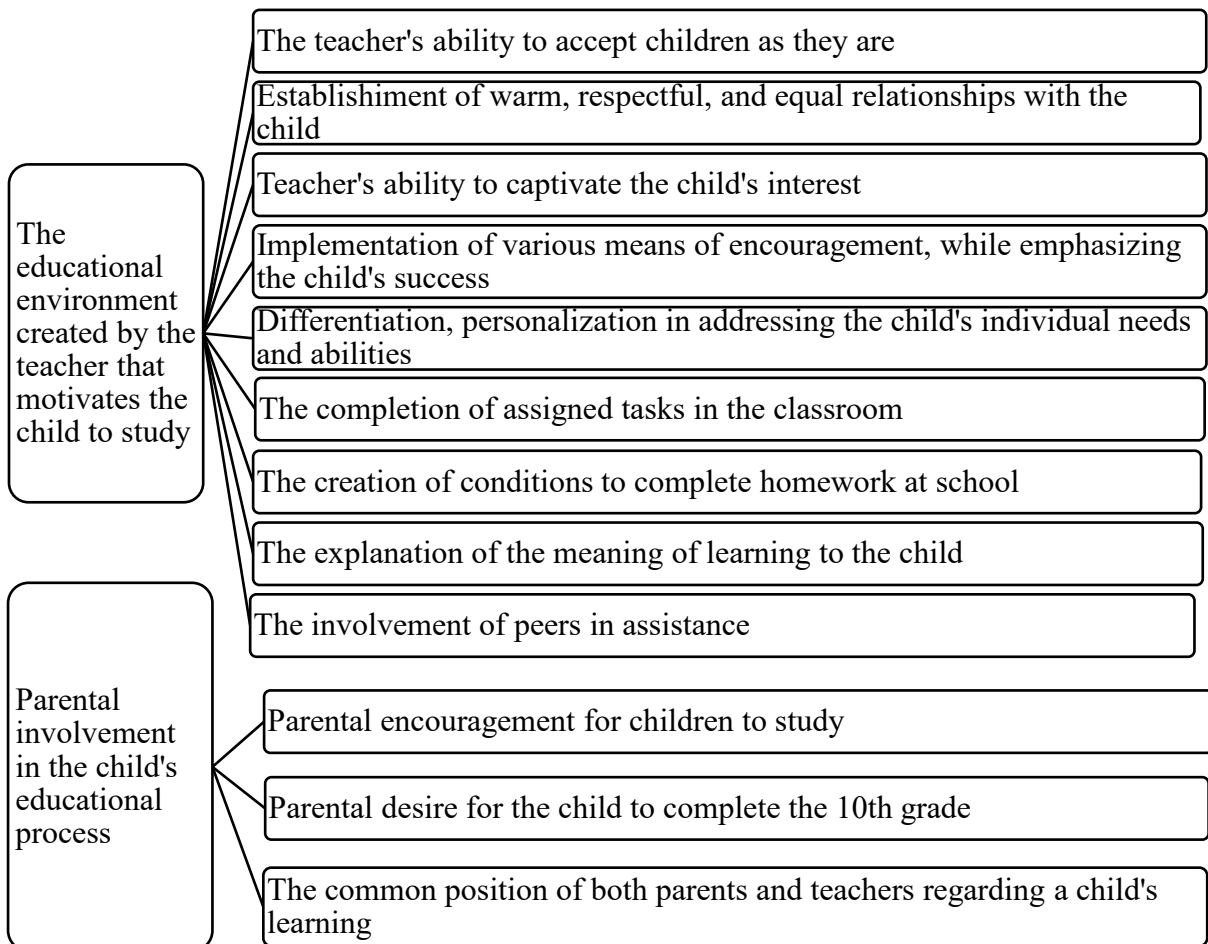


Figure 1 *Children's motivation to study* (created by authors)

The teacher motivates Roma children to learn by creating a favourable educational environment for them. The study shows that the teacher's ability to accept children as they are is extremely important in motivating them to learn: "the teachers' ability to approach without stigmatization. When children are not singled out, they work calmly" (M1). Additionally, creating warm, respectful, equal relationships with the child is also important. According to the research participants: "like any person, they don't like it when you say you must, you must. Simply, I think, like any person, they don't like a commanding tone. If you talk to them nicely, for example, could you please, we missed you, it's a kind of game, we all like it. We also don't like it when someone says something in a commanding way, demands something. If you say it nicely, it's done right away" (M8), "The teacher has to excite the child so that the child wants to come and is not afraid, because it is the contact between the teacher and the child that is important for that bond" (M16). The teacher's personalized approach to the child, based on constructive interaction and support, is crucial. When organizing the learning process, it is important to know the child well, respond to their needs, and help overcome learning difficulties. The importance of constructive interaction to motivate the child to learn is also emphasized by other authors (Gudžinskienė, 2010). Constructive interaction, based on a positive psychological atmosphere in the educational process, directed towards personal growth, motivates pupils to learn (Wang, Rubie-Davies, & Meissel, 2018).

The research indicates that the teacher's ability to engage the child motivates them to learn. Participants in the study stated: "If he finds the task interesting, he will do it himself" (M1), "I give interesting tasks related to life. He counts money very well... For example, there were negative numbers, and the child couldn't understand. I found a task with cards in the textbook. Since Roma children like to play cards, I used cards to explain the task. The most important thing is to relate it to the child's life experience" (M15), "It depends on the teachers themselves how they engage the child in learning. It is important that the child wants to come to class and feels good" (M16), "It needs to be interesting for the child. Link the task to practice, I always do that. When learning new things, relate them to what the child has learned, use it, involve their experience. For example, this child is good at counting money, so when we learn percentages, I use his knowledge and relate it to money. When I do that, he understands better" (M17). Therefore, the teacher's role is crucial in motivating children. Students willingly engage in the learning process when the learning content matches their interests, when attractive learning methods are found for them, and when they experience learning success. Hence, a teacher's ability to build a relationship with the child, explore various ways by involving the child in the educational process, and the teacher's pedagogical and didactic competencies create motivational systems that enable the child to feel satisfaction in learning and remain an active participant in the learning process, aiming for successful learning outcomes. J. Randi & L. Corno

(2022), A. Tonković, L. Pongračić & M. Lončar (2022) also emphasize the adaptation of educational content by linking it to the interests of learners.

Teachers, in their efforts to motivate children to learn, employ various incentive measures, emphasizing the child's success. This is illustrated by the statements of the research participants: "Let's say a child does a task, and you praise him. I say to him, listen, today you did better than ever, as it turned out well for you, and of course, he apparently thinks, okay, if I did well today, then I can do even better tomorrow, so it motivates him" (M8), "If you encourage them. In my classes I employ the system of an accumulated grade. Children really likes it that they can get that grade, and then it is added, for example, a child has an overall grade of 7, when the accumulated one is added, he sees eight in his school's diary and is very happy, he really likes it" (M16), "Praise is very motivating, then the child smiles, the mood improves. A child also likes it when I address him by name, not by last name" (M16), "Motivating a child is highly dependent on learning success, so it is essential not to forget to praise children not only for completing a task well but also for their efforts. It may be that a child tried very hard, and the result is not as expected, so I still praise" (M17). The motivation to study of Roma children is directly linked to their ability to experience success during the learning process. Therefore, a child's engagement in the learning process relies on the teacher's ability to maintain a close, warm relationship with the child, praising the child for even small learning achievements, providing an opportunity for the child to receive feedback on their learning results throughout the entire learning period. When teachers adopt an interactive communication approach, they involve students in the decision-making process, allow students to choose what and how to learn, encourage pupils to express their suggestions, reassure students, express their belief in students' ability to perform tasks, as well as provide clear feedback (Gabrielavičiūtė, Raižienė, & Garckija, 2022).

The study also shows that teachers motivate children to learn by differentiating and personalising activities and tasks to meet pupils' individual needs and abilities. For instance, according to the participants of the study: "I have differentiated work with my students, and they can choose their own option" (M4), "I adapt the tasks according to his abilities. Then he engages because if I give him a task that is too difficult, he won't do anything, and then nothing happens" (M9), "establish demands based on their abilities [...] this is very important" (M13), "we always try to adapt the tasks so that they are able to complete them, or I bring extra materials, tools so that they can do them" (M14). When creating an inclusive learning environment, it is very important for the teacher to properly assess pupil's abilities and, based on them, to differentiate the tools and adapt the learning materials to the child's individual needs. Other researchers (Randi & Corno, 2022; Tonković, Pongračić, & Lončar, 2022) also emphasize the importance of the creation of learning opportunities as well as the adaptation of the teaching methods and tools.

The study found that Roma children are reluctant to do homework at home, due to this, teachers try to provide opportunities for the children to complete as many assigned tasks as possible in class. The study participants pointed out that "Roma do not do homework, so we need them to complete tasks in class [...] sometimes you need to stand next to him" (M1), "we all know that he does not do homework, so we try to complete as many tasks as possible in class" (M17).

Since teachers are aware that not all Roma families have conditions at home that are suitable for doing homework, thus, teachers create opportunities for the pupils to complete tasks at school. The following statement of the research participant depicts this claim: "conditions have been created in the school for children to do their homework after lessons in the classroom, and children take advantage of it because they don't have the opportunity to study at home..." (M5). Learning outcomes depend not only on the student's interaction at school but also on the students' independent work at home, namely, completing assignments. One of the learning problems for Roma children, identified by participating teachers in this study, is the non-completion of tasks intended to be done at home, which is directly linked to the limited opportunities of Roma children to do their homework at home. Scholars emphasize the importance of teacher's work not only with the student but also with their family in order to ensure that the student is fully engaged in the learning process not only at school but also has the opportunity to complete assignments at home (Pescaru, 2018).

The study showed that children are motivated to study through the explanation of the meaning of learning: "In the future, you will need, for example, if you study, finish school, you can acquire some profession, you can have a better job. All those things, like when you finish school and move on to the next grade because they don't want to stay in the same class. Teachers try to find accessible words for each child when communicating with them" (M21). This suggests that, as teachers aim to motivate the children to study, they look for opportunities to link learning to personal benefits. Teachers connect success in class with students' expectations and future prospects. C. M. Pescaru (2018) and J. Randi & L. Corno (2022) also emphasize the benefits of education by linking it to greater career opportunities.

Teachers also use peer involvement strategies to motivate children. Participants in the study stated: "peer support and peer help to learn is also motivating" (M1), "the Lithuanian language teacher mentioned that his vocabulary is very poor. The teacher and I discussed what to do. The girls who know Lithuanian well help him once a day during break time in my classroom, they only speak to him in Lithuanian. Through the involvement of peers, we try to solve the problem of not knowing Lithuanian" (M3), "the Roma child is helped to understand the material by other children in the class who understand and complete the tasks well" (M14). The study shows that the involvement of the whole class in the learning process, which encourage cooperation and mutual

assistance, is crucial for a child's motivation to study. D. Wiliam & L. Siobhan (2015) highlight the value of teacher-supervised collaborative learning, where classmates assist each other in their learning, provide feedback, emotional support, therefore, create a cooperative classroom atmosphere.

The study found that a crucial factor in motivating Roma children to learn is parental involvement in the child's education process, e.g. the fostering of a supportive learning environment at home. The study results emphasize that parental motivation significantly influences a child's eagerness to study. According to study participants, “we had one girl who completed 10 grades and specialized. In my long teaching career, this is the only instance of a Roma child completing 10 grades. The parents played a crucial role in this achievement – they actively encouraged her to pursue education” (M5), “more wealthy families automatically link their child's future to education, insisting on academic dedication and high grades” (M14), “when conversing with successful Roma individuals, they express a desire for their children to attend school and graduate” (M15). When parents recognize the advantages of education and connect learning with a brighter future for their children, they naturally motivate and encourage their children to excel academically. Parents who have personally experienced the benefits of education are more likely to inspire their children to learn and underscore the importance of education through their own example.

The analysis of survey data indicates that parental aspirations for their children to complete grade 10 serve as a significant motivator for Roma students. As revealed in the study, “Many parents express the desire for their children to complete grade 10, citing legal requirements. At the age of 16, students are permitted to leave school and enter the workforce” (M6), “parents expect their children to graduate at least from the primary school. Some emphasize the importance of just completing the school, others aspire for higher academic achievements” (M17). It is evident that children are influenced by the explicit parental directive to stay in school until the age of 16, in accordance with legal obligations. Additionally, certain parents envision their children completing 10 years of education, pursuing further studies, and attaining specialized skills.

The study reveals that a shared attitude between parents and teachers towards children's learning is important for children's motivation. “Both parents and I share the same position” (M6), “A lot depends on the family. If the family is interested in the child's learning, it's all right, if the family doesn't care, nothing will happen. The school is ready to help, but the family has to make an effort” (M14).

Effective collaboration between schools and parents, along with a shared approach between teachers and parents regarding a child's engagement in the education system, is crucial for fostering the child's motivation to learn. Establishing a relationship of trust and cooperation between the school and the family lays the groundwork for achieving common objectives in the child's

learning journey, ensuring positive learning outcomes in the present and the future. Active engagement of the family entails playing a significant role in decision-making processes at school, especially in matters related to the child's learning path and career choices (Natividad-Sancho, Gairal-Casadó, Sordé Martí, & Yeste, 2023). Simultaneously, the educational attainment level within the family is paramount, as it is within the family that a child's attitudes and values toward learning and education take shape. Parents wield a considerable motivational influence when they can articulate the importance of learning through personal example, backed by their own educational background and its practical application in life and the professional realm. As highlighted by L. Kováčová (2015), education stands as a fundamental prerequisite for the development of every human community and fulfils a profound need for individuals as they prepare for independent living, personal growth, and positive integration into society.

### **Conclusions**

The study highlighted the impact of teacher-created educational environments and parental involvement on the motivation of Roma children to study.

Teachers foster motivation by accepting Roma children as they are and cultivating respectful, equal relationships that contribute to positive psychological well-being in the classroom and fosters personal growth. The teacher's ability to engage students, provide diverse incentives tailored to individual needs, and emphasize not only learning outcomes but also pupil's personal success and recognition plays a crucial role in motivating children to learn. Differentiation and personalization of the learning process are key elements in catering to each child's needs and abilities. In the context of working with Roma children, organizing the educational process to maximize in-class tasks is important, considering that not all children have the means to complete homework at home. As an example, offering opportunities for children to do their homework at school after regular hours becomes a significant aspect of fostering motivation. Teachers also aim to motivate Roma children through the explanation of the meaning of learning, through the discussions on the benefits of education, as well as through the exploration of potential career paths for them. Collaboration and cooperation among students is employed in order to overcome learning difficulties, to foster a sense of unity and to facilitate improved learning outcomes.

Parental involvement in the educational process is critical for motivating Roma children. Parents play a key role in creating a supportive learning environment at home, establishing clear learning objectives linked to the child's future education and career prospects. The shared attitude between parents and

teachers, regarding the child's learning, positively influences the child's motivation to learn.

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# INSTITUTIONAL SOCIAL RESPONSIBILITY IN THE INITIATIVES OF EDUCATION FOR SUSTAINABLE DEVELOPMENT IN LATVIA

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**Abstract.** *The article deals with the implemented initiatives of education for sustainable development in educational institutions and the evidence of institutional social responsibility in them. The data were collected by the content analysis of 15 homepages of institutions implementing education for sustainable development, questionnaire to 151 students aged 14-19 years and 24 interviews with 12 principals and 12 teachers on the state of the art of sustainability issues in their organisations. The sample of 12 educational institutions, principal and teacher represented the same educational institution: 4 primary schools, 4 secondary schools and 4 state gymnasiums with a wide geographical representation – capital, urban, small town and rural schools, as well as 7 online correspondences with the representatives of organisations implementing education for sustainable development initiatives in Latvia. The data show that sustainable development initiatives are not systematically implemented and monitored in educational institutions in Latvia. There is no co-financing at national level to provide targeted methodological support for teachers in implementing practice-based education for sustainable development, instead schools attract funding from Erasmus+ or other projects. There is also a lack of a common understanding of sustainability culture among the members of the education management team, as well as no studies have been carried out on institutional social responsibility in educational institutions and regarding the implementation of education for sustainable development in curricula.*

**Keywords:** *education for sustainable development, initiatives, institutional social responsibility, sustainable development goals, sustainable team management.*

## Introduction

The economic situation in Latvia and the world, the reform of districts in Latvia, and the tendencies of decreasing number of students in the context of the increasing amount of information and knowledge, place higher demands for educational institutions in Latvia, which are characterized by competitiveness, the ability to innovatively integrate into the development processes of the surrounding environment and are oriented towards the implementation of sustainable development.

Education is the means by which each generation passes on its culture, discoveries, successes and failures to the next. Without inter-generational education, very little can be sustained in the human context. Topicality of this study is identified by the role of education in the development of the world vision, which is determined by the crucial development plans and programmes mentioned below:

- United Nations General Assembly (2015) adopted the 2030 Agenda for Sustainable Development that has its core 17 Sustainable Development Goals (SDGs) and 169 sub-goals (United Nations General Assembly, 2015).
- UNESCO (2016) the Global Action Programme (GAP) on Education for Sustainable Development established Partnership Networks, it serves as a global community of practice and intensifies the partnership between the GAP activities of their members.
- The 40<sup>th</sup> UNESCO World Conference on Education for Sustainable Development (UNESCO, 2021) presented the framework for ESD entitled “Education for Sustainable Development: Towards the Achievement of the SDGs (ESD by 2030)”.
- Topicality in Latvia is confirmed by The National Development Plan of Latvia 2021-2027 which sets the priority "Knowledge and skills for personal and national growth", with the action line "Quality, accessible, inclusive education" aiming at “Quality implementation of new curriculum in general education and dissemination of best practices in teaching approach, with particular emphasis on entrepreneurship and digital skills, education for sustainable development and future skills” (Cross-Sectoral Coordination Center, 2020, p. 30).

The link between the SDGs and ESD has been established in two ways. Firstly, ESD is identified as an education goal in SDG 4, “Quality education” (Goal 4.7), as it “states that education should enable students to make informed decisions and take responsible actions for the integrity of the environment and the viability of the economy, also, improving the cognitive, socio-emotional and behavioural aspects of learning” (UNESCO, 2017, p. 8). Second, the SDGs need to be integrated into education as a subject. ESD enables students to acquire skills such as strategic competence, collaborative competence, global competence, critical thinking, self-awareness and integrated problem-solving (Rieckman, 2012). ESD is acknowledged as an important prerequisite for achieving all the SDGs in their aim to transform society (UNESCO, 2017).

There has been an increasing interest in ESD in Latvian educational institutions, but in the last decade, several terms have been introduced into education: *environmental education*, *global education*, *education for sustainable development*.

The aim of this article is to explore the institutional social responsibility in the initiatives of education for sustainable development in educational institutions in Latvia.

Research question: How the implemented sustainable development initiatives in educational institutions in Latvia indicate institutional social responsibility.

Regarding the presence of SDGs in formal education in Latvia, ESD is more implemented according to voluntary initiatives and culture of educational institutions. Study results show that institutions of education do not have a united vision and understanding of sustainable management culture in institutions (Kvelde & Odina, 2023).

### **Literature review**

The term of the sustainability of organisation is used as a synonym of sustainable development (SD) or social responsibility of organisation – it consists of economic, environmental, social (Bagdonienė, Galbuogienė, Paulavičienė, 2009), political and corporate responsibility aspects (Morrissey & Heidkamp, 2022).

Leal-Filho et.al (2016) states that governance for SD is crucially deficient, characterized by fragmented policy implementation and deficiencies in stakeholder cooperation and engagement. Active participation, collaborative learning and democratic decision making is a key factor when considering issues of SD, specifically in relation to SDGs achievement (Glass & Newig, 2019). The above-mentioned aspects are key factors for an institution to integrate a holistic sustainable team management into the culture of the organization (Warner & Elser, 2015).

Morrissey & Heidkamp (2022) recognize the importance and advantages of community engagement and empowerment, especially in educational institutions. ESD, also known as Education for Global Citizenship (EGC), is no longer just a set of educational activities, but a necessity that needs to find a place in curricula, pedagogy, classrooms, educational institutions and society at large. Wals & Lenglet (2016) point out that ESD is a form of education that aims to create “sustainability citizens”.

ESD implementation arrangements need to be integrated and monitored at two levels – national and institutional. UNESCO presents the toolbox of ESD for 2030 (2020), it provides an evolving set of selected resources to support Member States, regional and global stakeholders in developing actions, it, also, transforms the governance of the education institution. Priority action areas are: Advancing policy; Transforming learning environment; Building capacity of educators; Empowering and mobilizing youth and accelerating local level actions.

Based on the results of the literature review, two frameworks for effective implementation of ESD and sustainable team management in an educational institution are proposed. It is concluded that ESD frameworks are mostly applied in universities, but there is a lack of research on their implementation in schools due to the lack of quality criteria and monitoring of results.

- Ferrer-Estevez & Chalmeta (2021) proposes a framework to guide sustainability management processes through the SDGs in educational institutions, based on the Deming cycle (Swamidass, 2000), also known as the PDCA (Plan-Do-Check-Act) cycle, and strategic planning inspired by the “Participatory Conceptual Framework for Sustainable Transformation through Education” proposed by Kioupi and Voulvoulis (2019), whose steps are based on the Back-Casting methodology, which is considered best practice in long-term planning for sustainable transition (Holmberg & Larsson, 2018).
- Müller, Lude & Hancock (2020) present the concept of the sustainable team management in educational institution, see Table 1.

*Table 1 Summary of framework for implementation of ESD (based on Ferrer-Estevez & Chalmeta, 2021; Müller, Lude & Hancock, 2020)*

Framework of integrating SDGs in educational institutions	
Dimensions of implementation of ESD (Ferrer-Estevez & Chalmeta, 2021)	Stages of implementation sustainable team management towards ESD (Müller, Lude & Hancock (2020))
1. Methodology Step 1 Participatory process Step 2 Strategic planning Step 3 Implementation of the actions plans Step 4 Measurement of the indicators Step 5 Evaluation and decision-making	Stage 0: Sustainability is not (yet) an issue: <ul style="list-style-type: none"> <li>• only individual teachers deal with SDGs topics in their lessons</li> <li>• no evidence on the institutional and management level</li> </ul>
2. Resources <ul style="list-style-type: none"> <li>• Human resources: <i>Directive, Coordination group, Facilitators and Action groups</i></li> <li>• Documentary resources</li> <li>• Physical resources</li> <li>• Information technology resources</li> </ul>	Stage I: Projects: <ul style="list-style-type: none"> <li>• SDGs topics are tackled in the lessons from time to time</li> <li>• initiatives of interdisciplinary cooperation projects</li> <li>• education management is aware of the SD activities</li> </ul>
3. Interest Groups or Stakeholders <ul style="list-style-type: none"> <li>• Internal stakeholders: Board of directors, teachers, administrative staff and those with other occupations at the institution, students and families</li> <li>• External stakeholders: civil society, public administrations, companies, organizations and other academic institutions</li> </ul>	Stage II: System: <ul style="list-style-type: none"> <li>• the teaching staff regularly implements SDGs topics in the lessons</li> <li>• is involved in the development of teaching concepts, projects, cooperation with external partners</li> <li>• education management supports the SD activities in the educational institution</li> </ul>

<p>4. Maturity Model (evaluation model)</p> <ul style="list-style-type: none"> <li>• evaluation of the knowledge of the interest groups about the SDGs</li> <li>• evaluation of the quality and scope of the strategy'</li> <li>• evaluation of the achievement of the SDGs integration strategy</li> </ul>	<p>Stage III: Profile:</p> <ul style="list-style-type: none"> <li>• SDGs are integrated comprehensively into teaching and school life</li> <li>• expressly communicated sustainability school profile</li> <li>• education management initiates the SD activities in the educational institution.</li> <li>• the certification according to a formal quality label such as, “UNESCO Project School”, Eco-School or other, may have Eco-council</li> </ul>
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Research of Menzie-Ballantyne & Ham (2022) suggests that an integrated approach using ESD and EGC pedagogy has potential to:

1. enhance the development of literacy and numeracy;
2. hold potential for easing the pressures of a crowded curriculum;
3. provide students the opportunity to engage with their communities on real-world issues;
4. hold the key to fostering the knowledge, skills, values, attitudes and actions needed for employment and effective citizenship in a globalized world.

Ssosse, Wagner, Hopper (2021) summarised the main reasons for insufficient implementation of the ESD in educational institution:

- Lack of financial support from government and local authorities to implement reforms;
- Lack of awareness among education teams and stakeholders;
- Lack of quality teacher training;
- Lack of consensus on the methods and nature of ESD;
- Low engagement of society in SD as it is not a national priority;
- No tools developed to assess the effectiveness of ESD in primary and secondary educational institutions, few models used for universities;
- No criteria developed to assess the impact of ESD and set deliverables.

According to study results Ferrer-Estevez & Chalmeta (2021, p.11) state that “there is a need to develop a national framework to guide educational institutions towards the achievement of the SDGs and the promotion of SD has been detected”.

The UNESCO Education 2030 Global Framework for Action (2021) highlights the action needed in education curricula – improving teaching methods and learning environments. It is necessary to transform all aspects of the learning environment by taking a whole-institution approach to ESD to ensure that learners learn what they need to know in life and put what they have learned into practice. The new pedagogies of ESD advocate multi-method, experiential, active approaches to facilitate cognitive but above all affective learning, such as concrete learning situations, critical problem-solving and active learning that places the

student at the centre of the process and motivates to take part in the very design of pedagogical approaches.

Sant et al. (2018) state that integration around real-world issues also provides plenty of scope for community engagement at a variety of levels and the opportunity to nurture the types of active and informed community members. ESD has the potential to alleviate rather than add to what is perceived as a crowded curriculum (Koehn & Uitto, 2017). This suggests that rather than a curriculum review of what teachers are required to teach, the emphasis needs to be on developing and implementing appropriate professional development that looks at how teachers' plan and teach the ESD (Menzie-Ballantyne & Ham 2022).

In order to integrate ESD more effectively into teaching and learning processes, it is important for the management of educational institutions to build partnerships with national institutions, non-governmental organisations and support the initiative of teachers to participate in networks.

Institutional Social Responsibility (ISR) in the context of an educational institution, is defined as the ethical practice of transferring knowledge and actively participating in improving the well-being of society. By practicing ISR, also known as corporate citizenship, the community of educational institutions becomes aware of the impact it has on all aspects of society, including the economic, social, and environmental spheres. ISR includes public service activities such as outreach, an ethical framework to instil in students and administrative staff a sense of civic awareness and responsibility, contributing to SD, caring for the environment, conducting research activities that contribute to society and the nation (Risi et al., 2022). Glavic (2020) admits that some institutions are accepting the importance of ISR as an image-building strategy. However, it is also becoming a prominent issue in the educational sector, where education institutions can and should play a role in development of civic values and responsibilities (Glavic, 2020).

In Latvia, Sustainability Index is measured by the Institute of Corporate Sustainability and Responsibility (n.d.). Sustainable Index assessment has become popular also for public institutions, and universities in Latvia are willing to assess their performance against a range of sustainability criteria and use the data for development and improvement. This is also demonstrated by the latest results of the Sustainability Index, higher education institutions of Latvia are increasingly paying attention to ICR, for example, the University of Latvia has applied for assessment in 2023, Riga Technical University since 2018, RISEBA University of Applied Sciences since 2017, in total only 11 % (three out of 27) universities in Latvia.

According to Kvelde and Odina (2023), educational institutions do not sufficiently implement SD initiatives in the management process of educational institutions, which is not in line with Latvia's national policy and vision. One of

the reasons for this is that over the last 10 years, several terms such as *environmental education, global education and ESD* have been introduced into the Latvian curricula. This has hindered the development of a common understanding of ESD, linking it only to environmental issues.

### **Research design and Methodology**

The article deals with one aspect of a larger scale and long-term phenomenological research to explore the concept of sustainable team management in educational institutions. The data were collected by the content analysis of 15 homepages of institutions implementing education for sustainable development, questionnaire to 151 students aged 14-19 years and 24 interviews with 12 principals and 12 teachers on the state of the art of sustainability issues in their organisations. The sample of 12 educational institutions, principal and teacher represented the same educational institution: 4 primary schools, 4 secondary schools and 4 state gymnasiums with a wide geographical representation – capital, urban, small town and rural schools, as well as 7 online correspondences with the representatives of organisations implementing education for sustainable development initiatives in Latvia.

The following limitations were faced during the research process: first, over 20 interview invitations were sent to principals of different educational institutions. Responses were received from 12 principals and 12 teachers in four cities of Latvia (Riga and its district, Rezekne and its district, Ventspils and its district and Limbazi and its district) and represented different levels of education, such as primary, secondary and grammar schools.

The second limitation was faced during content analysis which revealed that not all websites of the organisations implementing ESD initiatives had quantitative data on the number of schools participating in projects or events on their websites, so online correspondence was performed to clarify the data in seven cases. The data received were summarised in the data analysis.

### **Results and Discussion**

Based on the literature review, the role of ESD in the implementation and achievement of the SDGs is viewed positively, but no common criteria have been developed to assess the results achieved by integrating ESD into education, curricula, and culture of organization. As a result, education has not been given a prominent role and there is no clear guidance on how to integrate ESD into the culture and management of an educational institution. Moreover, it is specifically highlighted as one of UNESCO's seven key strategies for scaling up reform, it points to the importance of defining the appropriate, relevant, and measurable

indicators at all levels – local, national, regional, and international – and for each initiative and programme (UNESCO, 2017).

Globally countries have implemented extensive public involvement measures to popularize the SDGs and to discuss the actions to be taken. Audit report says that 73 activities were implemented in Estonia, 249 activities in Finland, and 3,842 activities in Germany in 2020-2022, in comparison, four to eight SDG promotion activities were organized annually in Latvia between 2015 and 2019, but there is no activity in 2020-2022. Audit report states that “no regular, systematic, and inclusive measures are implemented to create a common understanding of the SDGs, their meaning and practical implementation in public and private sectors in Latvia. As a result, public understanding of the SDGs and their importance is still low, within the framework of which public and private sector organizations implement initiatives to promote the SDGs every year in European countries” (Latvijas Republikas Valsts kontrole/ [State Audit Office of Latvia] 2023, p. 5).

Content analysis of homepages of institutions shows that universities start developing a common understanding of the culture of sustainability in organisations, as well as of transformational management processes, while primary and secondary education institutions are not offered a nationally coherent framework for promoting ESD and practising a sustainable team management approach in the institution.

It is important to plan national campaigns to educate citizens about all the SDGs as well. It would be advisable to carry out a national study on the SDGs to analyse where teachers need support and methodological materials. Also, it is important to strengthen cooperation between organizations implementing Eco-Management and Audit Scheme (EMAS) or other eco-management systems and institutions to raise the awareness among students and teachers of SDGs or to strengthen the understanding of the development of an efficient national and business economy.

There are several organisations in Latvia that promote ESD, offering participation in projects, initiatives and creating a school culture for sustainable development. The Latvian National Commission for UNESCO (UNESCO Latvia) plays a crucial role in integrating sustainable development into education, within the framework of UNESCO's ESD 2030 programme, it aims to achieve personal and societal transformation.

Admittedly, most initiatives operate as non-governmental organisations (NGOs) or public organisations, attracting foreign partners/ supporters/ sponsors/ project funds without government funding. At national level, there is currently no targeted programme for the implementation of ESD initiatives in schools, with state support and co-financing, and no common framework and monitoring tool for the results to be achieved. So, participation in ESD projects is based on the strategic vision of the school management team, the initiative of teachers, the



promotion of ESD in society, and rarely the initiatives are initiated by students or their parents, the school community, and the municipality.

The content analysis of websites has been performed on the organisations and ESD initiatives (see Table 2) mentioned in interviews with school principals/ teachers and experts during the study.

*Table 2 Summary of content analysis of initiatives promoting institutional social responsibility in educational institutions in Latvia (created by authors)*

<b>Initiatives on Institutional Social Responsibility</b>	<b>Organisation</b>	<b>Performance</b>
<b>Initiatives on ESD</b>	Latvian National Commission for UNESCO (UNESCO Latvia)	Associated Schools Network (ASPnet) connects more than 12,000 schools in 182 countries. Implement programmes: <i>UNESCO Associated Schools Network (ASPnet)</i> , since 2015 “ <i>The World's Largest Lesson</i> ”, “ <i>The Baltic Sea</i> ”, also, organises educational programmes and ESD development projects.
	European Union programme for education, training, youth, and sport to attract support is Erasmus+ for the period 2021-2027 (Erasmus+)	Erasmus+ supports increasing opportunities for more participants and a wider range of educational institutions, focusing on its qualitative impact and contributing to a more inclusive and cohesive, greener, and digitally fit society. Between 2014-2021, over 13 million people have taken part in the programme. Erasmus+ provides funding for a project that contributes to a more effective implementation of the ESD.
	eTwinning	An initiative of the European Commission to promote European school cooperation through information and communication technologies (ICT) by providing the necessary infrastructure (online tools, services, support). eTwinning supports the Erasmus+ priorities. Active institutions can receive the “ <i>eTwinning Schools Label</i> ” as an example of eTwinning's inspiring principles of shared leadership, collaboration and sharing.
	The Education Development Centre (EDC)	Leading non-profit nongovernmental organization in Latvia in the field of teachers’ professional development, organises educational programmes, ESD development projects and develops methodological materials. Ongoing projects: <i>Learners as Co-creators of Their Own Learning; Digital Transformation in Adult Learning for Active Citizenship; Participation, Cooperation, Integration: Together in the 21st century; Strengthening a Culture of Tolerance in the School Environment, Global Education Week.</i>
	Latvian Platform for Development	A national level platform that brings together non-governmental organisations to work for societal resilience and sustainable global development and

	Cooperation <b>(LAPAS)</b>	society. Since 2019 Latvian Multistakeholder SDG Coalition. Since 2014, organising an annual <i>Global Education Week</i> , coordinated by the North-South Centre of the Council of Europe.
	The University of Latvia, Faculty of Education, Psychology and Art <b>(UL FEPA)</b>	The initiatives of study programmes and projects in teacher education, regarding the implementation of education for sustainable development initiatives in the educational sector. <i>Global Education Week</i> , “ <i>The World's Largest Lesson</i> ”, Erasmus+ project “Interactive Goals”
<b>Initiatives on Environmental Education</b>	Environmental Education Foundation of Latvia in cooperation with Foundation for Environmental Education <b>(FEE)</b>	Has implemented the global Eco-School programme since 2011, it is one of the most popular models of environmental education in the world. More than 56,000 schools around the world are involved in the Eco-Schools programme. The symbol is the Green Flag award. Ongoing Eco-school programme: <i>Eco-schools Days of Action</i> ; <i>Eco-schools climate campaign and other</i> . (Vides izglītības fonds/ [Environmental Education Foundation], n.d.).
	<b>Green Liberty</b>	A non-profit NGO, founded in 1993, aims to raise awareness about social and environmental implications of current trends in consumerism, trade and globalization. Ongoing projects: “ <i>ClimACT: Climate Education and Justice</i> ”, “ <i>Waste as a Resource in Latvia – Promoting Regional Sustainability and Circularity Through the Concept of Waste as a Resource</i> ”, etc.
	<b>Associated partner in Latvia of Worldwide Fund for Nature</b>	The mission is to build a future where people and nature live in harmony, working for nature and human well-being. Projects: “ <i>Bring Nature in Your School</i> ”, “ <i>Earth Hour</i> ”, “ <i>Climate Ambassador</i> ”
<b>Initiatives on Sustainable team management</b>	Eco-Management and Audit Scheme <b>(EMAS)</b>	EMAS, a whole-school approach, helps to implement sustainability in management, teaching and learning systems. Also, educational institutions can provide learners with consistent opportunities to practise what they learn.

In response to the research question about what ESD initiatives are being implemented in educational institutions have been analysed as there is no single and unified information website that brings together all ESD initiatives implemented in Latvia in which educational institutions could also have an impact on the data collection of the study. The actual data were analysed for the period 2014-2022 (See Figure 1).

Looking at Figure 1, the blue line indicating the total number of educational institutions implementing sustainable development initiatives shows that only 35% of schools (239 out of 660 schools, 2022) are implementing sustainable development initiatives, which can be explained by the impact of the recent Covid19 education reform on the education system, but overall, they partially meet the UN benchmark for quality education. In 2020, there was a peak in

schools' engagement in ESG initiatives, while this had declined during the pandemic, although by 2022 schools were again more engaged.

A limitation of the study is that the same educational institutions participate in several initiatives at the same time and rural schools are more active in several projects.

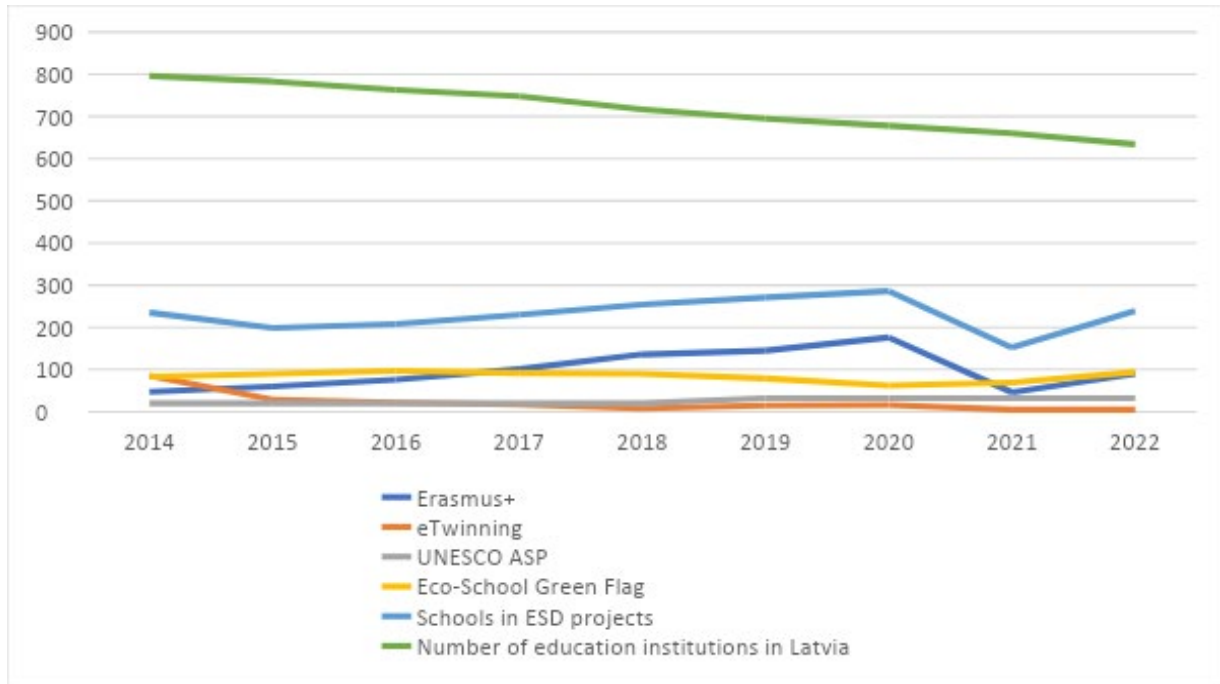


Figure 1 Summary of number of school Initiatives on institutional social responsibility (created by authors)

To find out what fostered Sustainable team management in educational institutions, the principals were asked, “*What is the evidence that your school is performing as a sustainable team?*” in the interview.

33% (four out of 12 educational institutions) named their teams as sustainable teams, emphasized that they promoted SD initiatives, as well, they had received the accreditation of Eco-School programme or had been involved in Erasmus Green Deal projects. They focused on teamwork and cooperation among administration team members, teachers, and student council, and, has the Eco-Council in educational institution. Institutions engage with the community through ICR activities, involvement of neighbouring educational and public institutions and advertising SDGs activities on social networks.

42% (five out of 12 educational institutions) noted that the priority of the educational institution was to implement digital transformation, so, they did not pay enough attention to SD and teamwork cooperation, which was influenced by the frequent change of teachers, COVID-19 pandemic, and the workload of teachers, in connection with what had been happening in the world in the last three years.

According to the findings of the interviews, key elements of sustainable team management related to team performance and ICR activities are: “*sustainable development action plan, active participation, competences of principals and teachers, organisational culture, team culture, team performance, cooperation with students and parents, initiatives comes from students or teachers, change management and adoption to new challenges, real-world relevance, as well, to promote sustainability in society and taking the initiative and participating in youth and NGO conferences and forums regarding sustainability*”.

Majority of the interviewed principals indicated that, “*principals and administration teams do not understand how to develop and maintain sustainable team management*”, also, the educational institution lacked “*an appropriate environment for the long-term development of their team and organisation*”.

Summarizing the data of teacher interviews, it can be concluded that a small number of teachers (four out of 12 educational institutions) integrate SD topics into the curriculum, while most educational institutions participate in projects related to environmental issues and the SDGs to attract funding and build a culture of sustainable attitude within the institution.

According to the questionnaire data to 151 students aged 14-19 years, to find out the level of knowledge about the SDGs in secondary school classrooms, also, to analyse which were the most used and the least used SDGs in education:

- As expected, the most familiar SDGs to secondary school students were those most talked about in the classroom, school, and society: *Good Health and Well-being (51%), Climate action (48%), Gender equality (47%), Quality education (42%)* and *Peace and Justice Strong Institutions (38%)*.
- SDGs about which secondary school students were least informed and used in the educational field were: *Industry, Innovation and Infrastructure (44%), No poverty (38%), Life below water (37%), Zero Hunger (35%), Decent Work and Economic Growth, Sustainable Cities (32%)* and *Partnerships to achieve the Goal (30%)*.

The government of Latvia has not allocated funding to primary and secondary educational institutions to integrate the SDGs into everyday practice. According to Audit report, “significant improvements are needed in Latvia both at the national and municipal levels to safeguard all the prerequisites for achieving the SDGs, also, the work with the SDGs takes place without process management, a specific plan, and a specific division of tasks and responsibilities” (Latvijas Republikas Valsts kontrole/ [State Audit Office of Latvia], 2023, p. 4).

Also referring to the data of the Ssosse, Wagner, Hopper (2021) study, the most effective way to integrate ESD in Latvia is to: provide financial support to the state and local governments to implement reforms; adopt a sustainable team leadership framework in Latvian school culture; provide systematic and high-quality teacher training and information on all SDGs; involve the community in

promoting the SDGs, GDP and other SDG initiatives. There is also a need to develop tools at national level to assess the effectiveness of promoting SD in primary, secondary and higher education, as well as criteria for assessing the impact of SD and for setting targets.

### **Conclusion and Recommendations**

Sustainable team management helps principals and their teams to lead educational institutions towards sustainability, as well as to achieve the institution's goals and cultivate a culture that values collaboration, recognition, and teamwork. Institutional social responsibility promotes the integration of the sustainable development goals' initiatives into the curriculum, the strengthening of global and civic competence for students and the team of educational institutions, the integration of ESD into the institutional culture and the preservation of a sustainable mindset.

- The data of the content analysis show that only 35% of educational institutions of Latvia (239 out of 660 schools, 2022) are implementing sustainable development initiatives, which can be explained by the Covid19 impact caused on the education system, but overall, they partially meet the UN benchmark for quality education. In 2020, there was a peak in educational institutions' engagement in ESG initiatives, while this had declined during the pandemic, although by 2022 schools were again more engaged. It has been also noticed that the same educational institutions participate in several initiatives at the same time and rural schools are more active in several projects. The most popular SDG initiatives are Erasmus+ projects, eTwinning projects and Eco-School programme.
- The questionnaire data show that the most familiar SDGs to secondary school students were those most talked about in the classroom, school, and society: Good Health and Well-being (51%), Climate action (48%), Gender equality (47%), Quality education (42%) and Peace and Justice Strong Institutions (38%). Also, the least informed and used SDGs in the educational field were: Industry, Innovation and Infrastructure (44%), No poverty (38%), Life below water (37%), Zero Hunger (35%), Decent Work and Economic Growth, Sustainable Cities (32%) and Partnerships to achieve the Goal (30%).
- The data of the interviews show that there is no common understanding of ESD, which is mostly associated only with environmental initiatives. ESD is an important aspect of quality education, but only 35% (239 out of 660, 2022) of schools in Latvia are actively building an ESD culture in their schools through ESD initiatives. The priority of the educational institution was also to implement the digital transformation and to

effectively address the consequences of the Covid19 pandemic, so there was no capacity or human capital to make ESD and the SDGs the second priority of the educational institution. Most of the ISR activities were implemented on the initiative of teachers/ students/ parents to take ownership and implement the activities.

Therefore, the following recommendations for effective implementation of ESD in education could be put forward:

- A national political action plan for the effective implementation of ESD should be developed.
- A study on ESD awareness in Latvian educational institutions should be conducted to identify teachers' needs in developing methodological materials.
- In cooperation with public authorities, compulsory SD events in educational institutions should be organised, similar to sports days, career week. For example, as a part of the European Sustainable Development Week (ESDW) or Global Education Week, to make ESD an integral part of the organisational culture and to develop ICR activities in schools.
- The lack of a single information site is a major problem, stagnating the promotion of partnerships between educational institutions, municipalities and NGOs implementing ESD activities and projects. A single information page should be set up on the government website, where educational institutions can find information on projects, initiatives, and methodological materials.
- There is a need to organise a methodological centre for the integration of ESD pedagogical methods and practices to provide teachers with advice and information on the latest trends in ESD.

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# KULTŪRPRATĪBA IZGLĪTĪBĀ UN SOCIOKULTŪRVIDĒ LATVIJAS VALSTS DIBINĀŠANAS UN ATJAUNOŠANAS VĒSTURISKAJOS PERIODOS

## *Cultural Literacy in Education and Sociocultural Environment the Historical Periods of the Founding and Renewal of the State of Latvia*

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**Abstract.** *The world's geopolitical conflicts and ideological pluralism of society raise the importance of cultural literacy development in the micro and macro relations of different nations. After the Second World War, nations formed the United Nations Educational, Scientific and Cultural Organisations (UNESCO), to learn peaceful coexistence based on cultural values. Latvia as a UNESCO Member State since 1991, together with 25 European Union countries, developed a handbook on cultural awareness and expression in 2016, and in 2023 – a material for promoting cultural literacy among young people. Latvians' love for their nation, language, and cultural heritage helped found their own country, Latvia, in 1918 and later, in 1991, to restore it, preserving its freedom to this day. In both historical periods and now, there have been minorities in Latvia. From 2023 onwards, education for them will be exclusively in Latvian. Therefore, in education and the socio-cultural environment, cultural literacy should be developed through the preservation of historical memory, patriotic education. The aim of the theoretical research is to find out the genesis of the concept of cultural literacy in relation to education in the socio-cultural environment of the founding-restoration period of the Latvian state. Using a quantitative method of systemic literature analysis; in the stage of qualitative analysis of historical documents, periodical content analysis, and data interpretation, it was concluded that the concept of cultural literacy in the educational content of the sociocultural environment of 1918-1940 can be seen in the United, Neighbourhood, Homeland, and Nationality teachings, but after 1991. - in the Latvian Folk Life Curriculum for Educators, in 1995, the program of the Latvian Latvian folklore education in the principle of educational methodology, 1995 in the Cultural Policy Guidelines - Chapter IV on General Education.*

**Keywords:** *education, cultural awareness, cultural literacy, history, sociocultural environment.*

## Ievads *Introduction*

Apvienoto Nāciju izglītības, zinātnes un kultūras organizācijas (*United Nations Educational, Scientific and Cultural Organisations*, turpmāk – UNESCO) Latvijas Nacionālās komisijas (turpmāk – LNK) izdevumā *Metodiskais materiāls jauniešu kultūrpratības veicināšanai* (Iliško, Skrinda, 2023) jēdziens *kultūrpratība* tiek skaidrots kā līdzdalība kopienas kultūras aktivitātēs, izglītošanās procesā, sagatavojoties dzīvei un darbam daudz kultūru vidē, spēja pārmantot arī nemateriālo kultūras mantojumu, tā stiprinot kultūras identitāti, spēja atrast informāciju par kultūru un, pielietojot to, kļūt par lietpratīgu kultūras vērtību veidotāju. *Kultūrpratība* kā *kultūras kompetence*, kas veicina toleranci un stiprina piederības sajūtu Latvijas kultūrtelpai (Iliško & Skrinda, 2023) *sociokultūrvīdē*. Savukārt Eiropas Savienības Publikāciju biroja (turpmāk – ESPB) *Kultūras izpratnes un izpausmes rokasgrāmatā* – formālās izglītības novērtējumā *kultūras izpratne un izpausme* minēta kā 8. kompetence, kas attiecināma gan uz skolotāja darbu klasē, veicinot skolēnu talantus, gan kā prasme veicināt starpvalstu dialogu. Te *kultūras izpratne* nozīmē – zināt, kāda ir kultūras un mākslas nozīme, attīstīt spēju to baudīt vai būt tajā ieinteresētam. Tas ir saistīts ar uztveri (piemēram, mūzikas klausīšanos, teātra uzveduma skatīšanos, mākslas darbu aplūkošanu muzejā). Turpretī jēdziens *kultūras izpausme* koncentrējas uz izjūtu vai ideju nodošanu ar mākslinieciskiem līdzekļiem un sevi pašu. Tas attiecas uz lietām, ko cilvēki saka, raksta, dzied, glezno, dejo, tēlo vai dara, lai parādītu savas izjūtas, uzskatus un idejas, un galvenokārt ir saistīts ar radīšanu/jaunradi (ESPB, 2016). *Kultūras izpratne un izpausme* konceptuāli ir *kultūrpratības* elementi.

*Kultūrizpratne un (paš)izpausme* kā jēdzieni ir lietoti 2020. gada kompetencēs balstītās izglītības satura vienā mācību jomā (MK, 2020), taču *kultūrpratības* koncepts šādā traktējumā tur nav ietverts. Savukārt 2023. gadā pilnveidotajā mācību saturā jomas mērķī parādījies jēdziens *pratība* (“Kultūras izpratnes un pašizpausmes mākslā *pratība*”), bet *Lielajās idejās* tiek atklāts šāds mācību jomas saturs: “(..) skolēni veido izpratni par kultūru – iepazīst, apzinās un izprot sevi un piederību tautas, valsts, kopienas kultūrai, apzinās kultūras mantojumu, kultūru daudzveidību un izpausmes, izprot mākslas darbā ietvertās idejas kā autora, laikmeta un kultūras mijiedarbību, kā arī iepazīst dažādus mākslas veidus – vizuālā māksla, mūzika, literatūra, teātra māksla – un to izteiksmes līdzekļus, piedzīvo jaunrades procesu.” Pilnveidotajā mācību saturā papildus tiek lietoti jēdzieni: *kultūras mantojuma saglabāšana un tradīciju pārmantošana, materiālais un nemateriālais kultūras mantojums, kultūras identitātes veidošana, piederība kultūrai, sava kultūra, personiskās kultūras vajadzības, kultūras notikumi, iepriekšējo laikmetu kultūras atsaucis, laikmeta un kultūras mijiedarbība, kultūras vispārīgais saturs* (Skola2030,

2023). Tiešā veidā nav minēti tādi jēdzieni kā *sociokultūrvide*, *kultūrtelpa*, *patriotisms* un *pilsoniskā līdzdalība* kā demokrātiskas, nacionālas valsts vērtības.

Jaunākie pētījumi liecina, ka strauji samazinās Latvijas skolēnu *patriotisms*, *pilsoniskā līdzdalība* – izpratne par *sociokultūrvidi*, tās ietekmi ar savu iesaisti un pilsonisko, sabiedrisko aktivitāti demokrātijas apstākļos. *Etnisko, nacionālo identitāti* jauniešu apziņā aizstāj *globālā identitāte*, kas mazina piesaisti lokālajai kopienai (Čekse, Kiris, Alksnis, Geske & Kampmane, 2023; Jurs & Samuseviča, 2020; Žogla, 2020). Aktualizējas problēma – kā jauniešos veicināt vēsturiskās atmiņas saglabāšanos, attīstīt *kultūrpratību* izglītības procesā, lai nodrošinātu ilgtspējīgu ieguldījumu arī pasaules miera uzturēšanā un tautu līdzās pastāvēšanā.

**Pētījuma jautājumi.** 1. Kādi *kultūrpratības* koncepti sociokultūrvidē un izglītībā saskatāmi Latvijas valsts dibināšanas un atjaunošanas periodos: no 1918. gada līdz 1940. gadam, pēc 1991. gada? 2. Kādi bija veicinošie vai kavējošie apstākļi šo konceptu iedzīvināšanai izglītībā?

Teorētiskā, vēsturiskā **pētījuma mērķis** – analizējot teorētisko literatūru, noskaidrot *kultūrpratības* koncepta ģenēzi saistībā ar izglītību Latvijas valsts dibināšanas un atjaunošanas vēsturisko periodu sociokultūrvidē.

**Pētījuma metodoloģija.** Pētījums tika veikts no 2023. gada novembra līdz 2024. gada janvārim, izmantojot kvantitatīvu sistēmiskās literatūras atlasē metodi, ierakstot Latvijas Nacionālās bibliotēkas *Digitālo grāmatu krātuvē*, *periodika.lv* meklētājriķā atslēgvārdus – *kultūrpratība*, *kultūras izpratne*, *izpaušme*, *izglītība*. Tad ar dažādiem kritērijiem, piem., gadi, pieejamība, valoda, publikācijas veids u. c., precizējot atlasī, tika izvēlēta pētījuma bāze – teorētiskie avoti, kuri kritiski tika izvērtēti pēc autentiskuma un zinātniskuma principa, akceptēti vai noraidīti, izveidojot gala pētījuma bāzi, tālāk analizēti ar kvalitatīvu kontentanalīzes metodi, kurā tika izprasts *kultūrpratības* koncepta atspoguļojums vēsturiskā perspektīvā, dažādās situācijās, saistītās ar sociokultūrvidi. Vēsturisko dokumentu un periodikas kvalitatīvo kontentanalīzi ietekmēja atziņas un secinājumi, kas iegūti pēc teorētiskā piesātinājuma principa, analizējot jaunākos zinātniskos rakstus par Latvijas valsts dibināšanas un atjaunošanas vēsturiskajiem periodiem un to sociokultūrvidi, izglītību (LU, LVI zinātnisko rakstu krājumi, LNB krātuve, u.c.). Datu interpretācijas posmā teorētiskajā kontentanalīzē iegūtie dati tika apkopot, salīdzināti, klasificēti, izdarot secinājumus (Mārtinsons, Pipere & Kamerāde, 2016).

**Kultūrpratības koncepti Latvijas valsts dibināšanas vēsturiskajā periodā no 1918. līdz 1920. gadam un līdz 1934. gada 15. maija apvērsumam**  
*Concepts of Cultural Literacy in the Historical Period of the Founding of the Latvian State from 1918-1920 and until the Coup of 15 May 1934*

Pirmais pasaules karš (1914–1918) nostiprināja Eiropas tautu pašnoteikšanās ideju, radot labvēlīgus apstākļus jaunu valstu izveidei. Latvijas Republikas proklamēšana 1918. gada 18. novembrī deva iespēju izveidot nacionālu izglītības sistēmu (likums *Par Latvijas izglītības iestādēm* un *Par Latvijas mazākumtautību skolām* (Latvijas Tautas Padome (turpmāk LTP), 1919a; LTP, 1919b)), kuras pamatā bija nacionālas intereses. Analizējot *Likumu par Latvijas izglītības iestādēm*, jāsecina, ka nekas nav minēts ne par patriotismu, ne kultūru, tās izpratni – ne etniskā, ne nacionālā, ne globālā nozīmē. Likuma 7. pantā kā obligāti noteikti šādi mācību priekšmeti: “Latviešu valoda (*valodas mācība, literatūras vēsture un rakstniecības teorija*), Latvijas vēsture un Latvijas ģeografija,” bet 10. pantā detalizēti *Ticības mācības mācīšanas noteikumi* (LTP, 1919a). Tas liecina, ka pat šajā vēstures periodā joprojām tautas pasaules uzskatu – garīgo, materiālo kultūru, tās izpratni – lielā mērā noteica kristīgās ticības dažādo konfesiju, t. sk. katoļu, pareizticīgo un vecticībnieku (uzskaitījums likuma 10.3. pantā), baznīcu vadības un ideoloģijas. Atteikties no tā gan bija iespēja, vecākam uzrakstot iesniegumu. Kā arī 10.2. pantā minēts, ka konfesija var pieteikt savu ticības mācību, ja to apgūs vismaz 10 skolēnu (LTP, 1919a). Jāsecina, ka šajā likumā skolēnu vecākiem bija paredzētas plašas iespējas piedalīties mācību satura veidošanā, ierosinot jaunu mācību priekšmetu apguvi, risinot sociālos jautājumus, veidojot kultūras pasākumus, ekskursijas, kas ir nozīmīgi *sociokultūrvides* veicinošie apstākļi *kultūrpratības* attīstībai, no mūsdienu perspektīvas raugoties.

Ilgstošas Latvijas teritorijas okupācijas, *Brīvības cīņu* karadarbības rezultātā notika sabiedrības aktīva migrācija, iedzīvotāju sajaukšanās un identificēšanās drīzāk ar trīs dažādu valdību – Kārļa Ulmaņa, Andrieva Niedras un Pētera Stučkas – politiskajām ideoloģijām. *Brīvības cīņu* patriotisma paraugs – *Cēsu Reālskolas* direktora Longīna Ausēja un *Valmieras Reālskolas* skolotāja Alfrēda Lukstiņa izveidotā Cēsu pulka 8. skolnieku rota no 108 skolēniem, kurai bija būtiska nozīme *Cēsu kaujās* un Latvijas Neatkarības izcīnīšanā 1919. gadā (Ciganovs, 2011). To nevarētu nosaukt par patriotisma audzināšanas metodi dzīves skolā, bet drīzāk par izdzīvošanas un nāves baiļu pārvarēšanas skolu tajā iesaistītajiem pusaudžiem. Taču kā pozitīvs, patriotismu audzinošs piemērs šis fakts tiek minēts mūsdienās daudziem Latvijas skolēniem atbilstošā mācību priekšmetā vai audzināšanas pasākumā izglītības iestādē.

Pēc *Neatkarības kara* tika atvērtas arī mazākumtautību skolas, kas bija finansētas no valsts budžeta (LTP, 1919b), tādējādi saglabājot un veicinot mazākumtautību kultūru viņu kopienu lokālajā kultūrtelpā. Dažādu kultūru

izpratnes un līdzās pastāvēšanas prasmei Latvijas sociokultūrvidē toreiz bija liela nozīme (Staris & Ūsiņš, 2000). Tai pat laikā Latvijas vēstures mācības grāmatu autors Fricis Zālītis rakstīja, ka neatkarīga Latvija gan pastāvēja, bet to nevarēja nosaukt par latvisku, jo latvieši bija saskaldījušies daudzās partijās (19 no tām 1920. gada 18. aprīlī iekļuva parlamentā), tāpēc mazākumtautību pārstāvji (pārsvarā turīgie ebreji un vācbaltieši), apvienojušies partijās, guva ne tikai lielāku varu un noteikšanu saimnieciskajā dzīvē, bet arī garīgajā, jo latvieši joprojām bija ar vergu, kalpu domāšanu un neapzināti sekoja svešām idejām, nonicinot paši savu latvisko kultūru (Zālītis, 1991, p. 324), kas vērojams joprojām arī mūsdienu sociokultūrvidē, jauniešiem sekojot angļiski runājošo kopienas kultūrai pasaulē un noliedzot savu latvisko kultūru.

1919. gadā, pēc *Brīvības cīņu* noslēguma, veidojot jaunās Latvijas Republikas valsts pārvaldes sistēmu, kultūras un mākslas procesu vadības darbi tika uzticēti Izglītības ministrijai. Tas ir svarīgs nācijas vienotas kultūras izpratnes caur vispārējās izglītības sistēmu veidošanas veicinošs apstākļi. Latvija pārņēma Zviedrijas Izglītības ministrijas sistēmu, kas bija ieviesta arī Igaunijā, Lietuvā un Somijā. Tur arī nebija atsevišķas Kultūras ministrijas.

1920. gada 18. novembrī Latvijā nodibināja Kultūras fondu (KM, 2020), tā finansējums sabiedrībai palīdzēja veidot latviskus kultūras notikumus, kas sociokultūrvidē radīja priekšnoteikumus arī nacionālas izglītības izveidei. Tieši Izglītības ministrija laika posmā no 1920. gada līdz 1923. gadam iniciēja izdot K. Barona *Latvju dainas* četrus sējumus, bet 1924. gadā – nodibināt *Latviešu folkloras krātuvi*, kuras uzdevums bija ne tikai vākt, krāt, pētīt tautas daiļradi (dainas, pasakas, teikas, sakāmvārdus u.c.), bet arī modināt par to tautas interesi, izdodot arī daudz grāmatu (Ambainis, 1989). Tas ir tautas, skolotāju, skolēnu kultūras izpratni veicinošs apstākļi Latvijas valsts veidošanas laika sociokultūrvidē un izglītībā.

Atbilstoši tendencēm Eiropā, arī skolās strauji ienāca reformpedagoģijas idejas: tika uzsvērtas uz skolēna personības attīstību vērsta mācīšanās pieeja, savukārt skolotājs – mācību procesa vadītājs un atbalsta sniedzējs skolēnam. Šom nolūkam mācību materiāls bija jāiegūst no tuvākās apkārtnes, reālās dzīves un jāmacās zināšanas pielietot dzīvē (LR IM, 1920, 1921; Ķestere, 2005). Šāda pieeja ir joprojām aktuāla arī mūsdienās – kompetenču izglītības pieejā balstītajā mācību metodoloģijā.

F. Zālītis 1920. gada *Izglītības Ministrijas Mēnešrakstā* Nr.1 publikācijā “Skolas uzdevums” rakstīja: “(..) Katrai jaunai paaudzei jāpiemērojas savas apkārtnes dabas un kultūras apstākļiem; jāpiesavinās visu iepriekšējo paaudžu kultūras ieguvumi. Tas notiek caur audzināšanu (..)” (Zālītis, 1920, p. 12). Mācību satura dalījumu priekšmetos bieži vien aizstāja *Apvienotā mācība* (arī *Apkārtnes* vai *Dzimtenes mācība*). Jaunizveidotajā Latvijā 1920. gadā pirmās mācību programmas tika publicētas *Izglītības Ministrijas Mēnešrakstā* Nr. 9.– Nr. 11. demokrātiskās valsts apstākļos (līdz Ulmaņa apvērsumam 1934. gada

15. maijā) izglītības kontekstā tika runāts par Dzimtenes, Tēvzemes mīlestību kā vērtību, kas arī veidoja *Dzimtenes mācības* filozofisko pamatu.

Lai gan tautas kultūras līmeņa (izpratnes) celšanas veicinošais apstāklis bija Izglītības ministrijas lēmums no 1920. gada līdz 1934. gadam izdot un izplatīt tautasdziesmas, pasakas, sakāmvārdus un citas pierakstītās folkloras vienības grāmatu krājumos (Straubergs, 1929), ar to vēl bija par maz, lai tautu latviskotu, celtu tās pašapziņu, jo kavējošs apstāklis bija vispārējais pēckara nabadzības sociālais līmenis ģimenēm, kas apgrūtināja visus bērnus sūtīt uz valsts apmaksātajām skolām, neskatoties pat uz likumā paredzēto sodu – 50 rubļiem (Ķestere, 2005; LTP, 1919a). Bija jātransformējas arī pieaugušajiem, lai varētu plānot vispārējo tautas izglītības un kultūras līmeņa celšanos labākas ekonomikas un komunikācijas sabiedrībā nodrošināšanai. Tāpēc straujais tautskolu pieaugums arī bija nozīmīga parādība, kas veicināja mūžizglītības procesu un tautas latviskā pasaules uzskata izkopšanu (Rubenis, 1990).

Bet no šodienas perspektīvas raugoties, vērā ņemams veicinošais apstāklis bija *Latvijas kultūras veicināšanas biedrības* darbība (1921–1925) ar 220 nodaļām visā Latvijas teritorijā, izdodot mēnešrakstu *Kultūras vēstnesis*. Kā uzsvērts vēsturnieka Alfrēda Bīlmaņa rakstā *Nacionālisms kā valsts pamats* (1921, Nr.1.), tieši tā saturs tautu izglītoja un veidoja Latvijas nācijas kultūrizpratni un pasaules uzskatu. Rakstā tiek secināts, ka, pirmkārt, ģimene, dzimta, ģints, cilts un tauta ir parādība, kas balstās uz radniecības jūtām, cieņu, godu, solidaritāti, kurā personīgais labums tiek saskaņots ar tautas labumu, otrkārt, dārgākā vērtība ir dzīvība, ko atdot par Tēviju, treškārt, valstiskā apziņa ir dabīga, tās izkopšana tagad ir iespējama savās nacionālajās, tautiskajās skolās, kurās mācīs tautas skolotāji (Bīlmanis, 1921, p. 2–4).

Secinājums: zināmā mērā jēdziens *valstiskā apziņa* ir *kultūrizpratnes* jēdziena viens no elementiem.

Bet cits kultūrizpratnes elements atpazīstams P. Liepiņa *Kultūras nozīme Latvijas valsts nostiprināšanā* (1921) skaidrojumā: “Zem vārda – *kultūra* – mēs saprotam dzīves labierīcības pieņemšanos pilnībā kā materiālā, tā arī garīgā ziņā. Bet kā tad līdz šim dzīvojām? (..) līdz šim mēs izpildījām vergiem uzliktās prasības: mazāk ēst, mazāk gulēt, sliktāk ģērbties, vairāk strādāt un zemāk locīties” (Liepiņš, 1921, p. 4–5).

Secinājums: kulturāla pašaprūpe, tiekšanās uz labklājību arī pieder pie sociokultūrvides kultūrpratības.

Pārskatot tādas *Kultūras vēstneša* tematus kā *Latvju kultūra viņas pagātnē un nākotnē*, *Kultūras pamatjautājumi*, *Etnogrāfiski materiāli* (rubrikas vairākos žurnāla numuros), jāsecina, ka žurnālam bija tautas apziņu izglītojoša un veidojoša loma sabiedrībā, kas ir vispārējo kultūrpratību veicinošs apstāklis. Izpētot rubriku *Latvijas skola citkārt un tagad* (1921, Nr. 4.–6. u.c.), vērojams, ka tieši šī žurnāla autori nodarbojās ne tikai ar Latvijas, bet arī ar Somijas, Igaunijas, Polijas, Lietuvas izglītības un kultūras jautājumu

pētniecību (1921, Nr. 4.–6.). Tas liecina, ka arī mazākumtautību skolas tika iekļautas Latvijas kultūrtelpā, nevis ignorētas.

Vēl būtiska loma tautiskas, latviskas izglītības (t. sk. kultūrpratības) veidošanā Latvijas sociokultūrvidē bija A. Viča redakcijā veidotā žurnāla *Audzinātājs* (1925–1939) rakstu autoriem no *Latvijas Nacionālās skolotāju savienības* (pārstāvji – L. Ausējs, P. Dauge, L. Adamovičs u.c.), kuri asi diskutēja savos rakstos ar otru pedagogu biedrību *Latvijas Skolotāju savienību* par nepieciešamību ievērot latviskās audzināšanas tradīcijas, akli neaizraujoties ar eksperimentiem (Ausējs, 1926). K. Dēķens rakstīja: “(..) daudzi no tagadējiem nacionālistiskajiem skolotājiem bijuši savā laikā dedzīgi pārkrievinātāji un pārvācotāji (..)” (Vičs, 1926). Taču Jānis Rainis kā izglītības ministrs (18.12.1926.–22.01.1928.) atbalstīja *Latvijas Skolotāju savienības* eksperimentālo pieeju pedagogijā, neskatoties uz to, ka pats bija tautā iemīļots dzejnieks, kultūras darbinieks un vairāku nozīmīgu kultūras institūciju – *Latviešu Folkloras krātuves*, *Rīgas Tautas konservatorijas*, *Nacionālās Operas* – izveides iniciators, arī kādreizējais mākslas departamenta vadītājs Izglītības ministrijā (1920). Raiņa, izglītības ministra, 1927. gada 20. septembrī parakstītais *Skolu reformu rīkojums* vēstīja: “(..) Vecā skola audzināja valdniekam (caram) paklausīgus pavalstniekus. Mūsu skolas uzdevums ir uzaudzināt pilnvērtīgus pilsoņus – demokrātiskās republikas suverēnās varas nesējus. Šis ideāls prasa, pirmkārt – lai ikviens pilsonis spētu valdīt pār sevi pats; otrkārt – lai viņš justos atbildīgs ne tik vien par saviem darbiem, bet arī par savas sabiedrības grupas un visas valsts darbību, un, treškārt – lai viņš būtu aktīvs, savstarpējas izpalīdzības un solidaritātes jūtu vadīts sabiedrības loceklis (..)” (Treijs, 1998). Šis rīkojums neparedzēja nacionālās pašapziņas, kultūrizpratnes u. tml. audzināšanu, t. sk. iekļaušanu izglītības programmu saturā. Rainis izvirzīja vairākus uzdevumus: 1) izglītības pieejamība arī darbaļaužu masām, 2) jāaudzina skolās brīvas, patstāvīgas personības, intelektuāli attīstīti un aktīvi cilvēki ar augstu pilsoniskās atbildības sajūtu (Treijs, 1998), tātad prioritātes – pilsoniskā izglītība, atbildība – demokrātijas apstākļos, nevis patriotisms un nacionālā identitāte kā emocionālas kategorijas.

Par 20. gs. 20.–30. gadu sociokultūrvidi savu viedokli detalizēti izklāstījis Ernests Brastiņš (1892–1942) Latvijas vēstures grāmatā *Latvija, viņas dzīve un kultūra* (Brastiņš, 1931). E. Brastiņš bija *Dievturu* kustības un reliģiskās sadraudzes dibinātājs (1926), Kara muzeja pārzinis (1921–1923), pilskalnu pētnieks, Latviešu folkloras krātuves pētnieks, tautasdziesmu vācējs, klasificētājs un izdevumu krājumu veidotājs, mākslinieks (LU LFMI, 2020). Pēc Neatkarības kara jaunā Latvijas valsts centās atgūt savu nacionālo kultūru, taču tauta, gadsimtos paverdzināta, pārvācota, pārkrieivota, joprojām sekoja kristīgajai reliģijai, kurā sākumā centās ieviest kādus nacionālus elementus. Taču, tāpat kā jaunlatvieši, E. Brastiņš, gan vācot folkloru, gan to klasificējot, konstatēja, ka latviešiem ir sava tautas kultūra, dzīvesziņa un reliģija, apdziedāta

tautasdziesmās. Kamēr tās nebija savāktas, pierakstītas, apkopotas, klasificētas, to vēl nevarēja publiski un zinātniski apstiprināt (Brastiņš, 1931). Strādājot Latviešu Folkloras krātuvē, Brastiņš arī sāka veidot jeb konstruēt tautas reliģiju, kā pētnieks pamatot tās filosofiju, kā rezultātā radīja *Dievturu kustību*, kurai gan sākotnēji nebija daudz sekotāju. Par tā laika sociokultūrvidi, kultūras izpratni un izpausmi viņš rakstīja: “Jo tuvāk laika straume nesa veclatvisko kultūru un dzīvi Latvijas valsts tapšanas brīdī, jo mazāk tanī palika nesadragātu vietu. Lietišķajā kultūrā iejaucās fabriku industrija ar saviem standartizētiem, internacionāliem ražojumiem, saimniecisko dzīvi vadīja muiža ar vācu kungiem, sabiedriskā dzīvē ielauzās lielpilsēta Rīga ar savām kuģos atvestām domām un modēm. Senās gudrības vietā stājās skolas un grāmatas, kuras gar latviešu īpatnībām nelikās zinis. Reliģiskā dzīvē beidzot virsroku ņēma kristīgā ticība ar visām savām konfesijām un sektām, bet senās tautas mākslas vietā ieviesās Eiropas “kultūrmāksla”” (Brastiņš, 1931, 172). Turpat sadaļā *Izglītība* Brastiņš aprakstīja straujo izglītības attīstību 20. gadsimta 20. gados, taču atzīmēja, ka joprojām tās kontekstā netika sniegtas skolēniem atbildes, kas ir *latviskais, latvietība, latvietis*, ka skolās nebija *īstlatvijas mācība* (Brastiņš, 1931, p. 206).

**Kultūrpratības koncepti Kārļa Ulmaņa autoritārā režīma laikā  
no 1934. gada 15. maija līdz 1940. gada 7. jūnijam  
*Concepts of Cultural Literacy during the Authoritarian Regime  
of K. Ulmanis in 15. 05. 1934.-7. 06. 1940.***

1934. gada 15. maijā K. Ulmaņa īstenotais valsts apvērsums iznīcināja demokrātisko valsts režīmu (daudzskaitlīgo partiju sadrumstaloto valdību), aizstājot to ar autoritāro režīmu, kurā partiju darbība aizliegta un pasludināta tautas vienotība, kuras pamatā ideoloģisks uzstādījums: vadonība, pozitīvisms un nacionālisms. K. Ulmaņa nacionālisma centrā – latviešu tautas un valsts interešu pārkums pār indivīda tiesībām, bet vadonība nozīmēja – K. Ulmani pasludināt par *tautas tēvu* – paraugu, kuram sekot un līdzināties. No pedagoģiskā aspekta raugoties, pusaudžiem ir nepieciešams tāds paraugs, kam līdzināties, lai formētos jaunieša personība.

Pozitīvisms nozīmēja stingru cenzūru, preses brīvības ierobežojumus (Hanovs & Tēraudkalns, 2012). Tikai E. Brastiņš turpināja izplatīt savu iesākto filosofiju 1935. gada izdevumā “Brīvā zeme” (1919–1940). Rakstā “Tautības mācība” viņš detalizēti aprakstīja tās saturu, ko vēlāk, 1936. gadā, izvērta grāmatā “Tautības mācība” (Brastiņš, 1936), kuras saturu varētu attiecināt uz pētāmā jēdziena *kultūrpratība* sākotnējo ideju, konceptu pēc būtības: “*Tautības mācība*, dažādos veidos pausta, paceltu latviešos tautisko apziņu, pamodinātu nacionālās jūtas un nospraustu latviskās gribas virzienu. (..) I daļā: 1) tautiskā ideja, viņas izcelšanās, vēsture, saturs, zinātniskie un prātnieciskie balsti; 2) kas ir tauta un tautība, viņu definīcijas, pazīmes un būtība; 3) nacionālisms un



tautiskums – sabiedriska kustība un garīgs strāvojums (ar pareizām un defektīvām formām). II daļā: tautisks cilvēks, viņa augšana, tapšana un uzdevumi (jauns tikumības ideāls, kurš dzīvē jāpiepilda. III daļā: tautiskā un latviskā kultūra, viņas tradīcijas saturs un jaunradīšanas virzieni (Latvijas reliģija, māksla, zinātne un filosofija te tiktu noskaidrotas savos pamatvilcienos). IV daļa: mācība par nacionālu valsti, viņas politiku saimniecībā, kultūrā un sadzīvē” (Brastiņš, 1935). Rakstītajos avotos nav ziņu, vai eksistē *Tautības mācības* programma tieši vispārīzglītojošām skolām, vai grāmata *Tautības mācība* (1936) kalpoja arī kā mācību līdzeklis skolās. Spriežot pēc 1937. gada statistikas, *dievturība* kā ticības mācība (iespējams *Tautības mācības* saturu) skolās tika mācīta (Rubenis, 1990, p. 132). Spriežot pēc ideoloģiskās tuvības, E. Brastiņam un K. Ulmanim bija kāda saistība. To apstiprināja novadpētnieks Ojārs Ozoliņš (1929–2014), kurš pētīja dievturu dokumentus. Viņš rakstīja, ka Ulmanis 1935. gadā uzklausījis Brastiņa ieteikumus kultūrā (Ozoliņš & Linde, 2017).

Ulmaņa autoritārisma laika sociokultūrvides nacionālisma (nevis etniskais) princips paredzēja ekonomikas “latviskošanu” un valsts nozīmes pieaugumu tajā, taču ierēdņi valsts un pašvaldības līmenī rūpējās, lai sociālais un ekonomiskais atbalsts būtu galvenokārt piešķirts latviešiem, nevis citu tautību pārstāvjiem. Šis fakts liecina par mijkultūru elementa apzinātu ignorēšanu kultūrpratības attīstības konceptā.

Daudzās un dažādās strādājošo kameras tika apvienotas padomēs. Viena no tām – *Valsts Kultūras padome*, kura formāli apstiprināja K. Ulmaņa jau pieņemtos lēmumus. Valsts (K. Ulmanis) par prioritāriem motīviem mākslā izvirzīja nacionālo mitoloģiju, vadoņa kultu un lauku dzīves idealizēšanu. Ulmaņa iniciatīva izglītībā – pilsētu bērniem tika piedāvāts vasaras pavadīt lauku saimniecībās, mācoties lauksaimniecību, kas bija viņa politikas prioritāte. Tas atbilda arī reformpedagoģijas idejai par darba skolu – mācībām, saistītām ar dabu, apkārtni. Vispārējās izglītības sistēmas galvenais mērķis bija ieaudzināt patriotismu, nacionālismu un lojalitāti valstij, nevis attīstīt etnisko identitāti, kas atzīmēts *kultūrpratības* koncepta pamatā.

K. Ulmanis iniciēja Latvijas Vēstures institūta dibināšanu un Latvijas valstij lojālu vēstures interpretāciju. Lai veicinātu pilsoņu iesaisti patriotiskajā audzināšanā, K. Ulmanis 1935. gada 28. janvārī izsludināja visas tautas akciju *Draudzīgais aicinājums*, kuras ietvaros aicināja Latvijas iedzīvotājus ziedot savām bijušajām skolām grāmatas un mākslas darbus. Arī šāda akcija atzīstama kā veicinošs apstākļi sabiedrības kultūras nozīmīguma izpratnei un attīsta *kultūrpratību*. K. Ulmaņa politikas ideoloģiskais uzsvars uz patriotisko audzināšanu bija radījis jaunu paaudzi ar spēcīgu nacionālu pārliecību, kas vēlāk kļuva par pretošanās spēku – kodolu okupācijas varai (Hanovs, et al 2012; Šķerbinskis, et al 2012; Stranga, 2017).

1939. gada 23. augustā nacistiskās Vācijas un Padomju Sociālistisko Republiku Savienības (PSRS) noslēgtā Molotova-Ribentropa pakta rezultātā (vienošanās par Austrumeiropas sadalīšanu), Latvija zaudēja savu neatkarību. 1940. gada 17. jūnijā Latvijas teritorijā ienāca Sarkanā armija (LNVN, 2023). Taču nacionāli noskaņotā sabiedrības daļa gan Latvijā, gan trimdā turpināja uzturēt idealizēto, latvisko Ulmaņlaiku tēlu cauri visiem okupācijas gadiem, un tas kļuva par vienu no iedvesmas avotiem Latvijas neatkarības atjaunošanas laikā – 1991. gadā.

### **Kultūrpratības koncepti pēc 1991. gada Latvijas neatkarības atjaunošanas** *Concepts of Cultural Literacy after the 1991 Renewal of Latvian Independence*

Ideja par tautas izglītošanu latviskā, tautiskā, patriotiskā garā Latvijas Republikas (LR) atjaunošanas laikā – 1991. gadā un vēlāk – lielā mērā bija K. Ulmaņa 1934.–1939. gadā uzsāktās iniciatīvas *Likums par tautas izglītību* (Ulmanis & Ādamovičs, 1934) atjaunojums vai turpinājums, atceroties “labos Ulmaņlaikus”. Gan viena, gan otra laika perioda vadošie politiķi saprata, ka tautas ideoloģiskos uzskatus var mainīt tieši ar kultūras un izglītības palīdzību (bet Ulmaņa izpratnē – papildus arī ar savas personības kultu un popularizēšanu tautā), ka kultūras un izglītības līmenim ir tiešs sakars ar sociālekonomiskā stāvokļa uzlabošanu, kas arī nodrošina neatkarību no citas valsts resursiem (pēc 1991. gada – no PSRS resursiem, bet pēc 1934. gada – no ekonomiskās krīzes un nabadzības, pie kuras noveda tautas vispārējā neizglītotība un pieredzes trūkums indivīdu mijiedarbībai demokrātiskā, pilsoniskā sabiedrībā un kultūras, vērtību trūkums komunikācijā starp LR pamattautu un mazākumtautību politisko partiju programmu idejām (1920–1934).

1990.–1991. gadā LR Tautas izglītības ministrijas pasūtījumā Anta Rudzīte sastādīja audzinātāju stundu programmu “Latviešu tautas dzīvesziņa”, kurā izklāstīti visi latviešu tikumi, svētki, ieražas, dzīvesziņa (Rudzīte, 1991). Tautas etniskā identitāte strauji atdzima, parādoties *Folkloras kustībai*, kura sākās kā 20. gs. 80. gadu dziesmotā revolūcija. Folkloras kustība cieši saistīta ar folkloras kopu, pētnieku došanos uz vispārējās izglītības iestādēm, lai skolēniem mācītu tradicionālās kultūras izpratni caur gadskārtu svētku svinēšanu, dziesmām, skaņu rīku spēli, amatniecību (Vīvere, 2023).

Mūsdienu *kultūrpratības* konceptam vispārējā izglītībā vistuvākais koncepts ir LR Izglītības ministrijas 1992. gada metodisko rakstu krājumā “Latvijas izglītības saturu veidojot” minētais *mācību tautziņas princips* izglītības saturā, proti, tautziņai ir jācaurauž visi mācību priekšmeti: “(..) izglītības saturā veidojamais nacionālais komponents īstenojams katrā mācību priekšmetā atbilstoši šī priekšmeta specifikai. Saskaņā ar izglītības satura nacionālā komponenta būtību tautiskais kā kategorija mācāms, nevis izceļot tā

pārākumu, bet gan parādot tā savdabīgumu, neatkārtojamību un nozīmīgumu tautai un cilvēcei (..), principa īstenojums atkarīgs no 1) skolotāja un skolēna attieksmes pret to, 2) no attiecīgās mācību satura atlasē un dozējuma, 3) no skolotāja izmantotās metodikas” (LR Izglītības ministrija, 1992).

1995. gada *Kultūrpolitikas pamatnostādņēs* tiek definēta *kultūrizpratne*: “Visplašākajā izpratnē – kultūra nav atsevišķa dzīves joma, bet ir viss, ko cilvēks sabiedrībā ir radījis un rada, ieskaitot sevi pašu un sabiedrību (..) Kultūras misija ir vairot humāno cilvēkā un līdz ar to sabiedrībā, tautā, veidot izpratni par vērtībām un cilvēciskās eksistences jēgu.” IV. Izglītība kā kultūras pamats un nākotne. 1. Vispārējā izglītība: “(..) Valsts veido saskaņotu kultūras un izglītības politiku, jo tām ir kopīgs mērķis – garīgi brīva, humāna un radoša personība (..), realizējot no izglītības politikas šķirtu kultūrpolitiku, var nonākt pie tā, ka valsts gan dod katram indivīdam brīvu pieeju kultūrai, taču šo iespēju vēlas izmantot tikai neliela sabiedrības daļa (..)” (Saeima, 1995). Šī nodaļa dokumentā liecina par kompromisu starp sabiedrībā pastāvošajiem viedokļiem, kur vieni vēlas apvienot Izglītības un Kultūras ministrijas, kā tas bijis Latvijas Republikas pastāvēšanas sākumā (1919–1940), bet otri – saglabāt padomju mantojumu, kura retorikā bija izdevīgi ar politisku lēmumu nodalīt kultūras un izglītības vadošo institūciju darbības, kas arī lēnām noveda tautu pie kultūrizpratnes, vērtību degradācijas. Iespējams, ka tas bija izdevīgi okupantu valdībai, lai vieglāk varētu pārvaldīt neapmierināto tautu un mainīt tās senču vērtības pret padomju okupantu uzspiestām vērtībām, ideoloģiju un kultūru (KM, 2020).

1995. gada *Kultūrpolitikas pamatnostādnes* bija pirmais valstiska līmeņa dokuments, kurā minēts jēdziens *kultūrizpratne*, un tas aplūkots arī vispārējās izglītības kontekstā. Taču tas nenozīmēja aktīvu politisku rīcību, jo tas bija Izglītības ministrijas kompetencē. Vēlāk sekoja Nacionālā programma “Kultūra” (2000–2010) kā minēto pamatnostādņu turpinājums un izpildes mehānisms (KM, 2020).

Kopumā vēstures periodu no 1991. gada līdz 2004. gadam pedagoģijā var raksturot kā laiku, kurā notika pakāpeniska atbrīvošanās no padomju ideoloģiskā kultūrmantojuma gan didaktikā, gan pedagoģijas vēstures interpretācijā, kā rietumu izglītības virziena pētniecības laiku, nacionālās izglītības filozofijas, metodoloģijas konstruēšanas laiku, kurā ar savu filozofisko domu piedalījās arī sabiedrībai nozīmīgas personības – rakstnieki, dzejnieki, politiķi u.c. (Ķestere & Stonkuviena, 2020).

Kopš 1991. gada būtisku lomu Latvijas sabiedrības sociokultūrvides un kultūrpratības koncepta attīstībā, izglītībā un kopienu kultūrtelpās veic UNESCO LNK izstrādātie metodiskie materiāli.

## Kontentanalīzes rezultāts *Result of a continence analysis*

Pēc daudzo vēsturisko avotu un zinātnisko publikāciju kvalitatīvās diskursu kontentanalīzes, tika veikts kultūrpratības konceptu apkopojums, ņemot vērā trīs vēsturisko periodu sociokultūrvīdes procesus. Tika izveidotas pārskatāmas tabulas (sk. 1. un 2. tabulu), kurās dažādi kultūrpratības koncepti kategorizēti kā fakti, lai uzskatāmāk varētu izdarīt secinājumus. 1. tabulā fakti, kuriem saistība ar kultūrpratību tika sakārtoti divās kolonās: veicinošie un kavējošie apstākļi. Šī detalizētā analīze sniedz atbildi uz 2. pētāmo jautājumu.

1. tabula. **Kultūrpratību veicinoši un kavējoši apstākļi** (Solvita Lodiņa)  
Table 1 **Enhancing and hindering conditions for cultural literacy** (Solvita Lodiņa)

Kultūrpratību veicinoši apstākļi	Kultūrpratību kavējoši apstākļi
<b>Latvijas valsts dibināšanas periods (1918–1920)</b>	
1919. – Latvijas Tautas Padomes likums <i>Par Latvijas izglītības iestādēm</i> un <i>Par Latvijas mazākumtautību skolām</i> nacionālas izglītības sistēmas izveidei.	Latvijas Neatkarības laikā ir trīs – K. Ulmaņa, A. Niedras, P. Stučkas – valdības. Katra savā pārvaldes teritorijā izdod savus politiskos dokumentus, kas tautu ideoloģiski sašķeļ un apmulsina.
1919. – Latvijas Neatkarības kara <i>Cēsu kaujās</i> Cēsu pulka 8. skolnieku rotas izveide – jauniešu patriotisma paraugs arī mūsdienu jauniešiem.	Neatkarības kara apstākļos traucēts normāls mācību process skolās, nabadzības dēļ daudzi bērni neapmeklē skolu.
1919. – Izglītības ministrijā izveidots Kultūras un mākslas departaments, nevis atsevišķas ministrijas, tas veicina mērķtiecīgu izglītības politiku.	Latvijai nav sava valsts pārvaldes efektīva modeļa, kas piemērots tieši šīs valsts attīstībai, tādēļ tiek pētīti, pārņemti, pielāgoti kaimiņvalstu modeļi.
1920. – Kultūras fonda dibināšana latvisku pasākumu sociokultūrvīdes nodrošināšanai.	1920. gadā latvieši sadalījušies daudzās partijās un nespēj vienoties kopīgai, efektīvai valsts attīstības politikai.
1920. – Latviešu folkloras krātuves dibināšana nolūkā vākt, krāt, pētīt folkloru un ieinteresēt tautu to apgūt un lietot.	No 1919. gada uzreiz nav pieejami mācību līdzekļi latviešu valodā ar Latvijai raksturīgu tēlu, tekstu saturu. Tie ir vācu, krievu valodā. Grāmatas latviešu valodā vēl tikai tiek veidotas.
1920. – mācību priekšmetu apvienošana <i>Apvienotajā mācībā</i> , arī <i>Apkārtnes</i> vai <i>Dzimtenes mācībā</i> , lai piemērotos saviem apkārtnes dabas un kultūras apstākļiem.	Joprojām skolās tiek pasniegta <i>Ticības mācība</i> . Poļu katolicisms, vācu luterānisms, krievu pareizticība – atliekas no iepriekšējo vēsturisko periodu okupantu ideoloģijām Latvijas teritorijā.
<b>Latvijas valsts demokrātiskais režīms (1920–1934)</b>	
Izglītības ministrijas iniciatīva izdot un izplatīt tautasdziesmas, pasakas, sakāmvārdus u.c. grāmatu krājumus.	Svešu izglītības ideju (reformpedagoģijas) pārņemšana un ieviešana bez plašām diskusijām par piemērotību Latvijas

	sociokultūrvidēi. Joprojām skolēniem netika sniegtas atbildes, kas ir <i>latviskais, latvietība, latvietis</i> , skolās nebija <i>īstlatvijas mācība</i> (Brastiņš, 1931, p. 206).
Tautskolu kustības parādīšanās mūžizglītībā veicināja tautas latviskā pasaules uzskata izkopšanu.	Joprojām baltvācu muižniecība ir turīgākā tautas daļa, kas ietekmēja Valsts attīstību, t.sk. finansējuma līdzvērtīgu piešķiršanu mazākumtautībām un to vajadzībām.
<i>Latvijas kultūras veicināšanas biedrības</i> darbība (1921–1925) ar 220 nodaļām pa visu Latviju un mēnešraksta <i>Kultūras vēstnesis</i> kultūras teorētiskos jautājumus skaidrojošā darbība, citu valstu izglītības pētniecība. Alfrēds Bīlmanis, viens no autoriem, 1921. gadā raksta par <i>valstisko apziņu</i> – jēdzienu, kurš nozīmē cieņas, goda, solidaritātes izjūtas pret ģimeni, dzimtu, ģinti, cilti, tautu un sava personiskā labuma saskaņošanu ar tautas labumu, tās vērtību – dzīvību, ko atdot par Tēviju (Nr. 1, 2.–4. lpp.) 1921. gada P. Liepiņš jēdzienu <i>kultūra</i> definē kā dzīves materiālo un garīgo labklājību, pretēji okupantu uzspiestam dzīvesveidam: mazāk ēst, mazāk gulēt, sliktāk ģērbties, vairāk strādāt, zemāk locīties (Nr. 1, 4.–5. lpp.).	<i>Latvijas kultūras veicināšanas biedrībai</i> nebija stabila valsts finansējuma, tāpēc tā savu darbību beidza.
<i>Latvijas Nacionālās skolotāju savienības</i> žurnāla <i>Audzinātājs</i> (1925–1939) izglītojoši raksti par izglītību un kultūru.	Latvijas Nacionālās skolotāju savienības konservatīvo un Latvijas Skolotāju savienības progresīvo, eksperimentālo izglītības ideju konfrontācija.
Jāņa Raiņa 1927. g. 20. septembrī parakstītais <i>Skolu reformu rīkojums</i> : 1. valdīt pār sevi, 2. atbildēt par saviem, savas sabiedrības grupas, visas valsts darbību, 3. būt aktīvam, izpalīdzīgam, solidāram sabiedrības loceklim.	Šis rīkojums neparedzēja nacionālās pašapziņas, kultūrizpratnes, patriotisma audzināšanu, t. sk. iekļaušanu audzināšanas programmās.
Ernests Brastiņš – mākslinieks, folkloras, pilskalnu pētnieks, publicists – izveidoja <i>Dievturu kustību</i> , kuras filozofija balstīta tautasdziesmās un pamatota ar pasaules filozofisko domu. 1931. gadā izstrādā Latvijas vēstures mācību grāmatu, analizē sociokultūrvidē notiekošos procesus.	Ernests Brastiņš 1931. gadā identificē problēmas būtību: “Lietišķajā kultūrā iejaucās fabriku industrija ar saviem standartizētiem, internacionāliem ražojumiem, saimniecisko dzīvi vadīja muiža ar vācu kungiem, sabiedriskā dzīvē ielauzās lielpilsēta Rīga ar savām kuģos atvestām domām un modēm. Senās gudrības vietā stājās skolas un grāmatas, kuras gar latviešu īpatnībām nelikās zinis. Reliģiskā dzīvē beidzot virsroku ņēma kristīgā ticība ar visām savām konfesijām

	un sektām, bet senās tautas mākslas vietā ieviesās Eiropas “kultūrmāksla”” (Brastiņš, 1931, p. 172).
<b>Latvijas valsts K. Ulmaņa autoritārais režīms (15.05.1934.–7.06.1940.)</b>	
27. 07. 1934. Kārlis Ulmanis izdeva <i>Likumu par tautas izglītību</i> . Tas ir 1919. gada likuma <i>Par Latvijas izglītības iestādēm</i> papildinājums ar vispārīgajiem noteikumiem, kuri paredzēja tautas izglītību un audzināšanu nacionālā, patriotiskā, valstiskā garā, Tēvzemes un darba mīlestībā, krietnībā, tautu un šķiru saprašanās garā.	Kārļa Ulmaņa nākšana pie varas nozīmēja arī oponentu ieslodzīšanu cietumos. Vardarbība neveicina miermīlīgu kultūrizpratnes attīstību sabiedrībā. Kultūrizpratnes attīstīšana uz emocionālo baiļu, izpatikšanas vadonim fona ir liekulības un izlikšanās attīstība sabiedrības apziņā, nevis dziļas kultūrizpratnes iegūšana.
Kārlis Ulmanis ir personība, paraugs Latvijas pusaudžiem audzināšanas procesā.	Kārļa Ulmaņa cenzūra, autoritāri lēmumi – demokrātijas pretpols.
Ernests Brastiņš 1936. gadā izstrādāja <i>Tautības mācību</i> – latvieša pamatzināšanu pamatu gan zināšanās balstīta nacionālisma attīstībai, gan latviešu pašapziņas, kultūras izpratnes celšanai.	Ernesta Brastiņa <i>Tautības mācība</i> plaši nav izplatīta, ieviesta izglītībā un pieņemta no sabiedrības. Nav zināmi kavējošie apstākļi, iespējams, varas, ietekmes un naudas trūkums, apzināta neiesaistīšanās politikā.
Valsts sociālais un ekonomiskais atbalsts latviešiem.	Mazākumtautību sociālā, ekonomiskā atbalsta trūkums veicina naidīguma attīstību pēc etniskās pazīmes, nevis kultūrpratību, kas paredz arī mijkultūru attiecību lietpratīgu veidošanu.
<i>Valsts Kultūras padomes</i> ieviešana (prioritātes: nacionālā mitoloģija, vadoņa kulta, lauku dzīves idealizēšana).	Valsts Kultūras padome ir formāla institūcija. Lēmumus autoritāri pieņem Kārlis Ulmanis.
Vispārējās izglītības sistēmas galvenais mērķis – ieaudzināt patriotismu, nacionālismu un lojalitāti valstij.	Pārspīlētais “tautiskums” un tā autoritāra uzspiešana neveicina kultūrizpratni un labprātīgu kultūras vērtību pieņemšanu.
<i>Latvijas Vēstures institūta</i> dibināšana – Latvijas valstij lojālas vēstures interpretācijai.	Ulmaņlaiku vēsture atspoguļo tikai Ulmaņa ideoloģisko diskursu kā vienīgo pareizo.
28.01.1935. – Kārļa Ulmaņa <i>Draudzīgais aicinājums</i> – pilsoņu iesaiste patriotiskajā audzināšanā, kultūrizpratnes veicināšana skolēniem, skolu mācību līdzekļu krājumu veidošana.	1940. gada 17. jūnijā Latviju okupēja Padomju Savienība – Strādnieku un zemnieku Sarkanā armija un pārtrauca visus latviešu centienus apzināt un izprast savu nacionālo kultūru.
<b>Latvijas valsts atjaunošanas periods (pēc 1991. gada)</b>	
Folkloras kustības, <i>Dziesmotās revolūcijas</i> attīstīšanās, 1991. gadā atgūstot Latvijas neatkarību. Folkloras kustības vadošo personību došanās uz mācību iestādēm, skolēnu folkloras kopu veidošana, praktiski izdzīvojot dabā gadskārtas, iesaistoties pētniecībā u.c.	Folkloristu konfrontācija ar Ernesta Brastiņa dibināto <i>Dievturības kustību</i> .

1991. – Latvijas valdība ratificē UNESCO <i>Konvenciju par nemateriālā kultūras mantojuma saglabāšanu</i> un izveido UNESCO Latvijas Nacionālo komisiju.	Latvijai jāreķinās ar UNESCO virzību uz globālo izglītību un nemateriālā kultūras mantojuma saglabāšanas formām, piem., veidojot fragmentāru prasmju sarakstus u.c.
1991. – Izglītības ministrija pasūta Antai Rudzītei izstrādāt audzināšanas programmu <i>Latviešu tautas dzīvesziņa</i> . Tā ietver latviešu tikumus, ieražas, gadskārtu svētkus, godus.	50 gadu laikā padomju ideoloģijas kultūra ir pārņēmusi visas tautsaimniecības jomas, t. sk. dziļi iesakņojusies izglītībā.
1992. – Izglītības ministrijas metodiskajā rakstu krājumā <i>Latvijas izglītības saturu veidojot ievērots mācību tautziņas princips</i> , kuram jācaurauž visi mācību priekšmeti.	Skolās tiek izmantoti padomju laika mācību līdzekļi, metodikas, ko uzreiz nav iespējams nomainīt.
1995. – Kultūras ministrija izveido konceptuālas <i>Kultūrpolitikas pamatnostādnes</i> , kuras paredz arī vispārējā izglītībā integrēt kultūrizpratni, veidojot garīgi brīvu, humānu, radošu personību.	Tā kā Izglītības ministrija un Kultūras ministrija ir atsevišķas institūcijas kopš padomju laikiem, <i>Kultūrpolitikas pamatnostādnes</i> izstrādātie vispārējās izglītības koncepti nenokļūst līdz reālai rīcībpolitikai.
2016. – UNESCO LNK kopā ar 25 Eiropas Savienības valstīm izstrādā <i>Kultūrizpratnes un izpausmes rokasgrāmatu</i> .	<i>Kultūrizpratnes un izpausmes rokasgrāmatā</i> izstrādātie ieteikumi ir rekomendējoša rakstura un mērķtiecīgi netiek ieviesti izglītībā.
2020. – Izglītības un zinātnes ministrijas (IZM) struktūrvienība Skola2030 izstrādā kompetencēs balstītu mācību saturu, kur viena no jomām ir <i>Kultūrizpratne un pašizpausme mākslā</i> .	Mācību jomā <i>Kultūrizpratne un pašizpausme mākslā</i> netiek iekļauti valodas, vēstures, dabas, dizaina un tehnoloģiju, vizuālās mākslas u.c. latviskai dzīvesziņai būtiski elementi.
2023. – UNESCO LNK pasūta Daugavpils Universitātes pētniekiem <i>Metodisko materiālu jauniešu kultūrpratības veicināšanai</i> .	Metodiskais materiāls jauniešu kultūrpratības veicināšanai ir nepieciešams visiem Latvijas novadiem, kultūrtelpām, nevis tikai lībiešiem un viņu kultūrtelpai (sk. metodiskā materiāla saturu).

Secinājums – katram pozitīvajam, veicinošajam faktoram var pretnostatīt tam atbilstošu kavējošo faktoru. Veidojot izglītības politiku kultūrpratības koncepta attīstībā, šis princips jāņem vērā.

2. tabulā ir iekļauti būtiskākie kultūrpratības koncepti no aplūkotās teorētiskās datu bāzes un sakārtoti hronoloģiskā secībā, sākot no mūsdienām un beidzot ar vissenāko. Katra koncepta identifikators ir atslēgvārds ar izvērstu aprakstu, raksturojošu citātu no konkrēta autora, avota. Šajā tabulā sakārtotie atslēgvārdi un koncepti vēsturiskā perspektīvā – arī ir *kultūrpratības* jēdziena ģenēze. Tabulā atspoguļotais saturs uzskatāmi atbild uz pētījuma 1. jautājumu par kultūrpratības konceptu vēsturisko ģenēzi Latvijas sociokultūrvidē.

2. tabula. *Kultūrpratības konceptu ģenēze* (Solvita Lodiņa)  
Table 2 *The genesis of cultural literacy concepts* (Solvita Lodiņa)

	<b>Koncepta autors, avots</b>	<b>Atslēgvārdi</b>	<b>Koncepts</b>
1.	Iliško & Skrinda, (2023). <i>Metodiskais materiāls jauniešu kultūrpratības veicināšanai</i>	<i>kultūrpratība</i>	Līdzdalība kopienas kultūras aktivitātēs, izglītošanās procesā sagatavojoties dzīvei un darbam daudz kultūru vidē, spēja pārmantot arī nemateriālo kultūras mantojumu, tā stiprinot kultūras identitāti, spēja atrast informāciju par kultūru un pielietojot to, kļūt par lietpratīgu kultūras vērtību veidotāju. <i>Kultūrpratība kā kultūras kompetence</i> , kas veicina toleranci un stiprina piederības sajūtu Latvijas kultūrtelpai.
2.	Skola2030, (2023). Papildinātais, kompetenču pieejā balstītais mācību saturs	<i>kultūrizpratnes un pašizpaušmes mākslā pratība</i>	Pratības elementi – jēdzieni: <i>kultūras mantojuma saglabāšana un tradīciju pārmantošana, materiālais un nemateriālais kultūras mantojums, kultūras identitātes veidošana, piederība kultūrai, sava kultūra, personiskās kultūras vajadzības, kultūras notikumi, iepriekšējo laikmetu kultūras atsaucis, laikmeta un kultūras mijiedarbība, kultūras vispārīgais saturs.</i>
3.	MK, (2018). <i>Noteikumi Nr. 747 par valsts pamatizglītības standartu un pamatizglītības programmu paraugiem</i>	<i>kultūrizpratne un pašizpaušme mākslā</i>	“(..) skolēni veido izpratni par kultūru – iepazīst, apzinās un izprot sevi un piederību tautas, valsts, kopienas kultūrai, apzinās kultūras mantojumu, kultūru daudzveidību un izpaušmes, izprot mākslas darbā ietvertās idejas kā autora, laikmeta un kultūras mijiedarbību, kā arī iepazīst dažādus mākslas veidus – vizuālā māksla, mūzika, literatūra, teātra māksla – un to izteiksmes līdzekļus, piedzīvo jaunrades procesu.”
4.	ESPB, (2016). <i>Kultūras izpratnes un izpaušmes rokasgrāmata</i>	<i>kultūras izpratne un izpaušme</i>	Skolotāja kompetence, gan veicinot skolēnu talantus, gan starpvalstu dialogu. <i>Kultūras izpratne</i> – zināt kultūras un mākslas nozīmi, attīstīt spēju to baudīt, būt tajā ieinteresētam; saistība ar mūzikas, mākslas uztveri. <i>Kultūras izpaušme</i> – izjūtu, ideju radoša nodošana ar mākslinieciskiem līdzekļiem jaunrades procesā. Tas attiecas uz lietām, ko cilvēki saka, raksta, dzied, glezno, dejo, tēlo vai dara, lai parādītu savas izjūtas, uzskatus un idejas.



5.	Kultūras ministrija (1995). <i>Kultūrpolitikas pamatnostādnes</i>	<i>kultūrizpratne</i>	Visplašākajā izpratnē kultūra nav atsevišķa dzīves joma, bet viss, ko cilvēks sabiedrībā ir radījis un rada, ieskaitot sevi pašu un sabiedrību (...). Kultūras misija ir vairot humāno cilvēkā un līdz ar to sabiedrībā, tautā, veidot izpratni par vērtībām un cilvēciskās eksistences jēgu.
6.	LR Izglītības ministrija (1992). <i>Latvijas izglītības saturu veidojot: rakstu krājums: metodisks līdzeklis</i>	<i>mācību tautziņas princips</i>	Izglītības saturā veidojams nacionāls komponents, īstenojams katrā mācību priekšmetā, atbilstoši šī priekšmeta specifikai. Saskaņā ar izglītības satura nacionālā komponenta būtību, tautiskais kā kategorija mācāms, nevis izceļot tā pārākumu, bet gan parādot tā savdabīgumu, neatkārtojamību un nozīmīgumu tautai un cilvēcei. Principa īstenojums atkarīgs 1) no skolotāja un skolēna attieksmes pret to, 2) no attiecīgās mācību satura atlases un dozējuma, 3) no skolotāja izmantotās metodikas.
7.	Anta Rudzīte, (1991). <i>Latviešu tautas dzīvesziņa</i>	<i>latviešu tautas dzīvesziņa</i>	Latviešu skolas audzināšanas ideāls: <i>latviskais cilvēks</i> – balts un tīrs, augstāko tikumu nesējs, garīgo vērtību uzturētājs, ar nevainojamu uzvedību, krietns pēc dabas un attiecībās ar cilvēkiem, vienmēr nomodā par tautas godu, spējīgs vadītājs un prot pakļauties ar cieņu, ir iejūtīgs, prot organizēt darbu. Katram skolēnam jāapgūst latviešu tautas vērtības, dzīves gudrības, tikumi, tradīcijas, gadskārtas un godi.
8.	Ernests Brašņiņš, (1936). <i>Tautības mācība</i>	<i>tautības mācība</i>	I daļā: 1) tautiskā ideja, viņas izcelšanās, vēsture, saturs, zinātniskie un prātnieciskie balsti, 2) kas ir tauta un tautība, viņu definīcijas, pazīmes un būtība, 3) nacionālisms un tautiskums – sabiedriskā kustība un garīgs strāvojums (ar pareizām un defektīvām formām). II daļā: tautisks cilvēks, viņa augšana, tapšana un uzdevumi (jauns tikumības ideāls, kurš dzīvē jāpiepilda). III daļā: tautiskā un latviskā kultūra, viņas tradīcijas saturs un jaunradīšanas virzieni (Latvijas reliģija, māksla, zinātne un filosofija te tiktu noskaidrotas savos pamatvilcienos). IV daļa: mācība par nacionālu valsti, viņas politiku saimniecībā, kultūrā un sadzīvē.

9.	Kārlis Ulmanis (idejas autors), (1934). Hanovs, D.& Tēraudkalns, V (2012) <i>Laiks, telpa, vadonis: autoritārisma kultūra Latvijā, 1934-1940</i>	<i>nacionālists, patriotisms, lojalitāte valstij</i>	Ideoloģiski vienota tauta. Centrā: <i>vadonība, pozitīvisms un nacionālisms</i> . K. Ulmaņa <i>nacionālisma</i> interpretācija - latviešu tautas un valsts interešu pārākums pār indivīda tiesībām, bet <i>vadonība</i> nozīmēja – K. Ulmanis – “tautas tēvs” – paraugs, kuram sekot un līdzināties. <i>Pozitīvisms</i> – stingra cenzūra, preses brīvības ierobežojums. Motīvi mākslā – nacionāla mitoloģija, vadoņa kults, lauku dzīves idealizēšana. Izglītībā – pilsētu bērni vasaras pavada lauku saimniecībās, mācoties lauksaimniecību, kas saskanēja ar reformpedagoģijas ideju par <i>darba skolu</i> , mācībām, saistītām ar dabu, apkārtni. Izglītības mērķis – ieaudzināt patriotismu, nacionālismu un lojalitāti valstij.
10.	Jānis Rainis, (1927). <i>Izglītības ministrijas Skolu reformu rīkojums</i>	<i>audzināšanas ideāls</i>	Skolas uzdevums – izaudzināt pilnvērtīgus pilsoņus – demokrātiskās republikas suverēnās varas nesējus, kas 1) spētu valdīt pār sevi pats, 2) justos atbildīgs ne tik vien par saviem darbiem, bet arī par savas sabiedrības grupas un visas valsts darbību, 3) būtu aktīvs, savstarpējas izpalīdzības un solidaritātes jūtu vadīts sabiedrības loceklis.
11.	Alfrēds Bīlmanis, (1921). <i>Nacionālisms kā valsts pamats</i> .	<i>valstiskā apziņa</i>	Cieņas, goda, solidaritātes izjūtas pret ģimeni, dzimtu, ģinti, cilti, tautu un sava personiskā labuma saskaņošanu ar tautas labumu, tās vērtību – dzīvību, ko atdot par Tēvijū.
12.	P. Liepiņš, (1921). <i>Kultūras nozīme Latvijas valsts nostiprināšanā</i> .	<i>kultūra</i>	Dzīves materiālā un garīgā labklājība, pretēji okupantu uzspiestam dzīvesveidam: mazāk ēst, mazāk gulēt, sliktāk ģērbties, vairāk strādāt, zemāk locīties.

### Secinājumi Conclusions

1. No aplūkotās literatūras vispilnīgāko informāciju par Latvijas valsts dibināšanas un veidošanas laika (1918–1940) kultūrpratības koncepta attīstību var konstatēt E. Brastiņa publikācijās (t. sk. 1931. gadā). Viņa *Tautības mācības* satura idejas paustas 1935. gadā: I daļā: 1) tautiskā ideja, viņas izcelšanās, vēsture, saturs, zinātniskie un prātnieciskie balsti; 2) kas ir tauta un tautība, viņu definīcijas, pazīmes un būtība; 3) nacionālisms un tautiskums – sabiedriska kustība un garīgs strāvojums (ar pareizām un

- defektīvām formām). II daļā: tautisks cilvēks, viņa augšana, tapšana un uzdevumi (jauns tikumības ideāls, kurš dzīvē jāpiepilda. III daļā: tautiskā un latviskā kultūra, viņas tradīcijas saturs un jaunradišanas virzieni (Latvijas reliģija, māksla, zinātne un filosofija te tiktu noskaidrotas savos pamatvilcienos). IV daļa: mācība par nacionālu valsti, viņas politiku saimniecībā, kultūrā un sadzīvē”, tā korelē ar mūsdienu Skola2030 vienas mācību jomas *Kultūrizpratne un pašizpaušme mākslā* saturu.
2. Reformpedagoģijas filosofija par reālā dzīvē, praktiskā darbā balstītu mācīšanos Latvijā 1920. gadā saskatāmas *Apvienotās, Apkārtnes vai Dzimtenes mācības* metodiskajos uzstādījumos, kuros priekšplānā bija mīlestība pret Latvijas dabu, Tēvzemi, darbu kā vērtību (kultūrpratības elementi). *Apkārtnes mācības* kontekstā tiek diskutēts par integrētās pieejas efektivitāti skolēna personības pilnvērtīgā attīstībā.
  3. Sabiedrības kultūrpratību attīstīja *Latvijas kultūras veicināšanas biedrība* (1921–1925) ar 220 nodaļām visā Latvijas teritorijā, izdodot mēnešrakstu “Kultūras vēstnesis,” kur A. Bīlmanis pauda ideju par *valstisko apziņu*, kura nozīmē cieņas, goda, solidaritātes izjūtas pret ģimeni, dzimtu, ģinti, cilti, tautu un sava personiskā labuma saskaņošanu ar tautas labumu, tās vērtību – dzīvību, ko atdot par Tēviju. Savukārt jēdziens *kultūra* tiek definēts kā dzīves materiālā un garīgā labklājība pretēji okupantu uzspiestam dzīvesveidam – mazāk ēst, mazāk gulēt, sliktāk ģērbties, vairāk strādāt, zemāk locīties.
  4. Kultūrpratības konceptam K. Ulmaņa autoritārā režīma laikā raksturīgs autoritāri uzspiests tautiskums, nacionālās mitoloģijas aktualizēšana, tautas vadoņa personības kults, *Draudzīgais aicinājums* sabiedrībai bagātināt skolu mācību līdzekļu klāstu ar tautas artefaktiem, folkloras krājumu izdošana un izplatīšana dažādos pasākumos, jaunatnes iepazīstināšana ar Latvijas lauku darbiem vasarā, Latvijas Vēstures institūta dibināšana, lai pārrakstītu Latvijas valstij lojālu vēsturi.
  5. Pēc 1991. gada kultūrpratības koncepta attīstību būtiski ietekmēja Latvijas iestāšanās UNESCO, *Konvencijas par nemateriālā kultūras mantojuma saglabāšanu* ratificēšana Latvijā, Izglītības ministrijas izdotā audzināšanas programma *Latviešu tautas dzīvesziņa* (1991), LR Izglītības ministrijas metodisko rakstu krājumā “Latvijas izglītības saturu veidojot” (1992) minētais *mācību tautziņas princips*, pieņemtās *Kultūrpolitikas pamatnostādnes* (1995), kur IV. nodaļā “Izglītība kā kultūras pamats un nākotne” tiek uzsvērtas saskaņotas kultūras un izglītības politikas nozīme vispārējā izglītībā, veidojot garīgi brīvu, humānu un radošu personību.
  6. Kultūrpratības koncepta attīstību Latvijas sociokultūrvidē mūsdienās turpina noteikt un virzīt UNESCO LNK, izveidojot *Kultūrizpratnes un izpaušmes rokasgrāmatu* (2016) un *Metodisko materiālu jauniešu kultūrpratības veicināšanai* (2023), taču tiem ir rekomendējošs raksturs,

kas netiek pārvērsts mērķtiecīgā izglītības politikas rīcībā, veidojot jaunus mācību programmu paraugus, kuros *kultūrpratība* būtu caurviju kompetence, jo tās elementi attiecas uz visām mācību jomām.

7. Kultūrpratību izglītībā visvairāk veicina šādi apstākļi:
  - *Tautības mācības* ieviešana vispārējās izglītības iestādēs un atbilstošu mācību līdzekļu izstrāde, ņemot vērā lokālo kultūrtelpu kultūrvēsturisko mantojumu;
  - vecāku iesaiste vispārīzglītojošo skolu mācību programmu ierosināšanā, līdzdalībā ekskursiju, pasākumu plānošanā un īstenošanā, kā arī mācību līdzekļu piegādē mācību iestādēm (K. Ulmaņa *Draudzīgā aicinājuma* idejas piemērs);
  - Izglītības ministrijas un Kultūras ministrijas apvienošana vienā institūcijā, kura spēj efektīvi īstenot nacionālus ideoloģiskos uzstādījumus sabiedrības izglītošanai un audzināšanai par pilsoniski brīvu, aktīvu, demokrātiju izprotošu sabiedrību, kura ciena un ņem vērā savu vēsturisko mantojumu, plānojot politiku nākotnē.
  - finansējuma piešķiršana sabiedrisku pasākumu veidošanai ar valstij nozīmīgām vērtībām un izglītojošu saturu, valsts izdevumiem – folkloras krājumiem, vēstures pētniecībai.
8. Kultūrpratību sociokultūrvidē viskavējošākie apstākļi:
  - Valsts politika, kuras ideoloģiskie uzskati apzināti konfrontē etnisko pamattautu ar mazākumtautībām, nevis veicina izglītību, kultūrpratības attīstību,
  - vardarbīga un autoritāra ideoloģisko diskursu uzspiešana sabiedrībai, ideoloģiskā cenzūra,
  - latviešu pamattautas sašķelšanās daudzās politiskajās partijās, pretēji mazākumtautību spējai apvienoties, izveidojot spēcīgu politisko spēku, ar nozīmīgu ietekmi.
9. *Kultūrpratības* koncepta tālākā ieteicamās attīstības forma – *kultūrapziņas kompetence*, tas izriet no aplūkotajiem jēdzienu atslēgvārdiem un to nozīmju skaidrojumiem ģenēzes vēsturiskā perspektīvā. *Kultūrpratība* var tikt uzspiesta autoritāri, bet *kultūrapziņas kompetenci* var izveidot brīvi, nepiespiesti, labprātīgi – tikumiski krietns un morāli tīrs, garīgs cilvēks, fiziski vesels, tāds, kurš apzinās savas vajadzības visos līmeņos, tāpēc ir atbildīgs patriots par savu un savas valsts attīstību demokrātiskā veidā, tāpēc mīl savu tautu, Tēvzemi, kultūru un cienpilni glabā to nākamajām paaudzēm. Tādas personības Latvijas vēsturē ir bijušas. Mūsdienu pedagoģu atbildība ir tādas izaudzināt arī šodien.

## Summary

The development of the concept of cultural literacy in the socio-cultural environment of Latvia continues to be defined and promoted by UNESCO LNC through the creation of the Methodological Material for Promoting Cultural Literacy among Young People (2023), but it is of a recommendatory nature, which is not translated into targeted educational policy action, creating new curriculum models for different cultural and socio-cultural environments of Latvia. Cultural literacy should be a transversal competence, as its constituent elements apply to all areas of learning.

At the time of the establishment of the Latvian state, the Reform Pedagogy philosophy of real-life, practical work-based learning entered the school methodology, which in the formative education of the Latvian sociocultural environment of 1920 could be seen in the methodological settings of the United, Neighbourhood or Homeland Teaching, in which love for Latvian Nature, Homeland, work as a value were at the forefront. In the context of the Neighbourhood teaching, the teachers discussed the effectiveness of the integrated approach in the full development of the pupil's personality. This is in line with the principle of teaching Latvian folk life defined in the 1992 methodology of the Ministry of Education - which should permeate all subjects with Latvianness, the Guidelines for Cultural Policy adopted by the Ministry of Culture in 1995 and the program of Latvian folk life for school teachers developed by the Ministry of Education in 1991.

From the literature reviewed, the most complete information on the development of the concept of cultural literacy during the period of the foundation and formation of the Latvian state (1918-1940) can be found in the publications of E. Brastiņš. The content of the Nationality Teaching Programme, which he developed in 1936, correlates with the content of one of the teaching areas of today's Skola2030, Cultural Literacy and Self-Expression in Art.

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# STUDENTS' VISUAL LITERACY DEVELOPMENT IN PRIMARY SCHOOL: THE INFLUENCE OF TEACHERS' ABILITY TO VISUALIZE EDUCATIONAL INFORMATION

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**Abstract.** *In modern digital society visual content is an integral part of human life. Developing visual literacy strongly which is connected with such soft skills as critical thinking, creative thinking, communicating and collaborating is an important aspect in school education. The research is aimed at demonstrating the dependence of primary school students' visual literacy on the primary school teachers' abilities to visualize effectively educational information in the process of teaching.*

*The survey was conducted within the time period of 2019–2023. The team of researchers from Institute of Pedagogy of National Academy of Educational Sciences of Ukraine (Didactics Department) carried out an exploratory study within the primary school system in Ukraine. The total number of respondents consisted of 52 primary school teachers and 415 students.*

*The study finds out that nowadays the primary school teachers' visualizing educational information skills are not sufficiently developed. Boosting the development of visualizing educational information skills among primary school teachers will be resulted in primary school students' visual literacy development.*

*Having significant positive effect on primary school students' visual literacy development the mentioned primary school teachers' skills guarantee serious positive impact on learning results of primary school students in total.*

**Keywords:** *primary school; primary school teachers; teachers' visualizing skills; visual literacy; visualizing educational information.*

## Introduction

Primary school teachers work in a dynamic, information-saturated world and, according to the concept of Education 4.0, should actively involve ICT in the educational process to ensure its effectiveness. They teach modern students

(children of the alpha generation) who are attuned to visual perception of information. Therefore, a primary school teacher should be able to find, analyze, critically evaluate, interpret, update and effectively use educational information in visual form; create educational visual content using modern ICTs and digital software; use visualization methods directly in active interaction with students during the educational process.

The significance ascribed to the visual literacy of primary school teachers and the development of their proficiency in visualizing educational information emanates from the pervasive integration of visual content within the contemporary information society and the educational system. Digital visualization is an integral component of the blended/remote educational process in primary schools. Visualization methods use in conventional classes aligns with the classical tenet of visibility (which is of paramount significance in primary education) with the provisions of competence-based, activity-based and personality-oriented approaches. Therefore, the research is aimed at demonstrating the dependence of primary school students' visual literacy on the primary school teachers' abilities to visualize effectively educational information in the process of teaching.

## **Literature Review**

As noted in the document “What you need to know about literacy”, “Literacy is a continuum of learning and proficiency in reading, writing and using numbers throughout life and is part of a larger set of skills, which include digital skills, media literacy, education for sustainable development and global citizenship as well as job-specific skills. Literacy skills themselves are expanding and evolving as people engage more and more with information and learning through digital technology” (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2024).

At its core, visual literacy, like any other (information, digital, financial, legal, etc.) is the fundamental basis necessary for effective communication with modern society.

The Association of College & Research Libraries (2022), European Network for Visual literature (Schönau, Kárpáti, Kirchner, & Letsiou, 2020) and International Visual Literature Association (2023) define visual literacy as “a set of abilities that enables an individual to effectively find, interpret, evaluate, use, and create images and visual media. Visual literacy skills equip a learner to understand and analyze the contextual, cultural, ethical, aesthetic, intellectual, and technical components involved in the production and use of visual materials. A visually literate individual is both a critical consumer of visual media and a competent contributor to a body of shared knowledge and culture” (ACRL, 2022).

The Media and Information Literacy Curriculum for Educators and Learners (UNESCO, 2021) and The Framework for Visual Literacy in Higher Education (ACRL, 2022) note that an important component of developing competence education is the formation of learners' visual literacy. The Common European Framework of Reference for Visual Literacy (Wagner & Schönau, 2016) states that visual literacy comprehensively covers all academic disciplines at all education levels.

Present-day studies allow us to conclude that visualizing methods, techniques and visualization tools occupy a significant place in modern educational process (Berradia, 2023; Yilmaz & Simsek, 2023; Leroux, 2023; Anderson, Chaparro, Smolkowski, & Cameron, 2023). As stated in the study by Lengler & Eppler (2007) more than 150 well-established methods are used in the practice of visualization.

The concept of "New Ukrainian School" in primary education recommends to use the next visualization methods (strategies):

- visual strategies for development of critical thinking: creation of conceptual tables, tables "analysis of concept features", Venn diagrams, cyclic diagrams, tree diagrams, Fishbone diagrams;
- a strategy for reviving the visual imagination during reading (the Visual Imagery Strategy), aimed at in-depth awareness of information, concretization of facts, the sequence of events, etc.;
- introduction of knowledge maps in the educational process for improving memory, recalling facts, words, images; ideas generating; concepts demonstrating; holistic educational material revising; results or events analysing, information structuring, promoting the solutions search;
- creation and use of visual materials for organizing class everyday activities: choice circles for resolving conflict situations, rules and routines visual definitions;
- visual techniques for accompanying reading with understanding: using the scheme-figure "I establish connections" to work out the text according to a four-stage model of understanding, schemes of "thin" (literal, which are aimed at remembering information) and "thick" (aimed at understanding, applying, analyzing, evaluating information and its creative processing) questions;
- visual support of the strategies "Daily 3" and "Daily 5", in particular, the creation of an "I-scheme" as a support in independent students learning activities, the introduction of "reading pictures (illustrations)" from the book at the initial stage of the reading competence formation;
- creating and using word walls in the learning process to visually support literacy, promote the learning of the alphabet and new vocabulary from

- all educational fields;
- strategies for organizing classroom discussions (for example T-scheme);
- strategies for developing students' writing skills and critical thinking: a KWL table (I know – I want to learn – I learned) for expressing existing knowledge, forming a query for further learning and reflection, a RAFT table (role-audience-format-topic) – for creating your own texts on the selected topic;
- visualizing information on cubing strategies, brainstorming, associative bush, etc (Ministerstvo osviti i nauki Ukraïni, EdEra & Osvitorija, n. d.).

### **Research Methodology**

A study was conducted in general education institutions (2020–2023). In the course of devising and executing research initiatives, the team of researchers from Institute of Pedagogy of National Academy of Educational Sciences of Ukraine (Didactics Department) took into account the experience of scientific and pedagogical activity amid the backdrop of unforeseeable global perturbations, including the Covid-19 pandemic and the imposition of martial law in Ukraine (Topuzov, Malykhin, & Aristova, 2022; Malykhin, Kaupuzs, Aristova, Orska, & Kalvans, 2023). The total number of teachers involved in the study was 52.

Interaction with primary school teachers was aimed at creating organizational and didactic conditions for the development of their visualizing educational information skills. It included a series of meetings with primary school teachers. Also teachers improved their visualizing skills using didactic and methodological materials for visualizing educational information, posted on the author's website "Visualization in primary education" (available: <https://sites.google.com/view/vizualschool>).

Primary school teachers (1) expanded their knowledge of modern visualization methods and appropriate visual forms of educational information representation; (2) deepened their knowledge of the psychological and pedagogical basis for educational information visualizing in primary school educational process (issues of children's cognitive psychological processes: visual perception, visual thinking and imagination were considered); (3) got acquainted with the basics of the visual educational materials design for primary schools and the possibilities of modern information and communication technologies, which are advisable to create educational visual content. Considerable attention was paid to the development of primary school teachers' skills to select and use appropriate visualization methods and tools to solve specific educational tasks in educational process; abilities to create, find and

update the necessary educational visual content; abilities to adhere to moral, ethical and legal norms for using visual content from open sources.

Among classes that joined the study methods of visualizing educational information and modern visual tools were widely used in the students' educational and cognitive activities. Interactivity of the learning subjects was ensured during their processing. For example, teachers were offered to use author's online Ukrainian language reference books, which contribute to the formation of direct subject competence, as well as the visual literacy formation and development of primary school students' visualization skills (available: <https://prezi.com/view/uUMvi8kLG6OcwbFu5o93/> (first grade), <https://prezi.com/view/KaRSdjUa4pzeR7WKzL3G/> (second grade).

In order to ascertain the efficacy of initiatives undertaken, diagnostic dialogues were conducted with teaching teams at the initiation of collaboration and during the concluding phase. These discussions centered on elucidating the influence of visualizing educational information on the primary school educational process. To find out the dynamics of educational results of students involved in the study, knowledge cross-sections were conducted in the first and the fourth grades. The total number of students involved in the study was 415.

The testing of first grade students was aimed at identifying the level of formedness of their skills in (1) visual presentation of verbal information and (2) analysis, synthesis and interpretation of information presented visually. Testing tasks were developed on the basis of diagnostic tasks for determining children's readiness for school education and appropriate methodological recommendations.

## Results and Discussion

The majority of students showed high (37%) and medium (54%) levels of formation of these skills, while 9% corresponded to a low level. The most difficult task for students was to draw a person based on a verbal description (an adapted version of the Kern-Jirasek school readiness test). In the task, students were asked to draw a person according to the description: *“Our English teacher Kateryna Petrivna is medium height, slender and young. She has light curly long hair. She has dark eyes, black eyebrows and black eyelashes. Today at the lesson Kateryna Petrivnawas is dressed very smartly: she has a long blue skirt and a white blouse. She is wearing a beautiful blue turquoise necklace.”* This test was aimed both at diagnosing the skills of visual representation of verbal information and assessing the formation of graphic activity skills, topological and metric spatial representations. It identified the general level of student's mental and cognition development, the arbitrariness of mental activity. The results clearly demonstrate that about a quarter of first grade students (27%) showed a low level, 55% – an average level, and 18% – a high level of student's mental and cognition development.

Examples of students' works are shown in Fig. 1. The top row represents works by students who have both a high level of skills of visual representation of verbal information and mental and cognition development. The middle row shows works by students who have both an average level of skills of visual representation of verbal information and mental and cognition development. The bottom row shows works by students who have both an low level of skills of visual representation of verbal information and mental and cognition development.



Figure 1 Examples of work of first grade students (adapted version of the Kern- Jirasek school readiness test) Source: own study

Table 1 Results of the task “Draw a person according to the description” (adapted version of the Kern-Jirasek school readiness test)

Source	First grade students' skills in (1) visual presentation of verbal information and (2) analysis, synthesis and interpretation of information presented visually	Level	Respondents (%)
Testing of first grade students	Students' abilities to visually present information presented verbally and to analyze, synthesize and interpret information presented visually	high	37%
		average	54%
		low	9%
Osvitnii ombudsmen Ukrainy	Intellectual readiness for school education (children aged 5/6 years)	high	14%/73%
		average	72%/27%
		low	14%/0%
	Psychological readiness for school education (children aged 5/6 years)	high	5%/59%
		average	76%/41%
		low	19%/0%

Source: own study & Osvitnii ombudsmen Ukrainy (2020).

Upon juxtaposing the acquired outcomes with the mean indicators of preparedness exhibited by children aged 6(5) years for scholastic education in Ukraine (Osvitnii ombudsmen Ukrainy, 2020), the analysis reveals a marginally diminished level of results in the conducted study (Table 1). This can be explained by the narrow test focus and the specificity of tasks related to the students' visualization information skills. This confirms the need for the targeted attention to the formation/development of primary school students' visual literacy.

To determine the dynamics of children's development, this test was also performed when students reached the fourth grade. The obtained results are shown in Table 2.

**Table 2 Results of the task “Draw a person according to the description”**  
(adapted version of the Kern-Jirasek school readiness test)

Visualization Skill	Level	Grades (%)		Dynamics
		1st grade	4th grade	
Ability to visually present information submitted verbally	high	18	87	+69
	average	55	13	-42
	low	27	0	-27

Source: own study.  
n=415

The examples of students' works are given in Fig. 2.



**Figure 2. Examples of work of 4th grade students (adapted version of the Kern-Jirasek school readiness test)** Source: own study

The results increased significantly. This can be explained by the complex pedagogical influence, in particular due to experimental activities, and intensive mental development of children in the period from 6(7) to 9(10) years.

In the fourth grades students' tests were conducted to specify the significance of the pedagogical impact caused by experimental activities. They were based on the relevant test materials of the all-Ukrainian external monitoring of the primary education quality of 2021 (Lisova et al., 2022) “State of primary school graduates' reading and mathematical competences formation”). Tasks that were directly

related to the visualization of educational information were selected. The obtained data, as well as the results of the all-Ukrainian external monitoring of the primary education quality of 2021 (Lisova et al., 2022) are shown in Table 3.

**Table 3 Results of students' ability to perform tasks directly related to the visualization of educational information (reading and mathematical competences) Source: own study & Lisova et al. (2022)**

Ability to perform tasks directly related to the visualization of educational information	Level	4th grades (%)		Dynamics
		Own study	All-Ukrainian external monitoring*	
Reading competence	high	25.5	21.1	+4.4
	average	44.0	40.9	+3.1
	basic	25.0	27.7	-2.7
	low	5.5	10.3	-4.8
Mathematical competence	high	24	22.4	+1.6
	average	40.6	39.6	+1
	basic	31	27.8	+3.2
	low	4.4	10.2	-5.8

\* – the given percentage ratios characterize the overall level of development of reading and mathematical competencies, respectively

It should be noted that according to the all-Ukrainian external monitoring of the primary education quality of 2021 (Lisova et al., 2022), test tasks related to the visualization of educational information (reading tasks that include texts of interrupted and mixed type; as well as tasks in mathematics of the content category “Working with data”) are defined as complex. So, the increase by several percent in students' ability to perform these tasks in comparison with the overall results aimed at forming students' reading and mathematical competences should be considered as a confirmation of the positive impact of the teachers' visualizing educational information skills development on the success of primary school students.

According to the results of conversations with primary school teachers at the beginning of the study, we state that they use pre-selected or hand-created digital visual materials in the educational process and have some experience in using modern information and communication tools for creating visual content (Padlet, Kahoot, Miro, Google Forms etc.). At the same time, teachers are not sufficiently aware of visualization as a teaching method. They do not have enough knowledge



concerning the design of didactic visual materials, tools for creating digital visualization. The results of the final conversations show an increase in teachers' design and instrumental skills in visualizing educational information, as well as their ability to plan, organize, control, evaluate, correct and improve the activity of visualizing educational information in the educational process.

At the end of the study, teachers show a positive effect of visualization on students' motivation for (1) learning (cognitive) activities, (2) the development of their critical thinking, creativity, communication and collaboration skills. They admit that there is a tendency of improving students' academic performance. Teachers show a great interest and high motivation in the use of forms, methods, techniques and tools for visualizing educational information in the educational process of primary schools. During the discussion of the topic on visualization of educational information as a component of modern education, they note the relevance and expediency of its including in the content of advanced training courses.

### **Conclusions and Prospects for Further Research**

So, the results of conversations with primary school teachers who joined the study indicate a significant positive trend in the development of their skills in visualizing educational information. Teachers' knowledge of the theory and practice of visualization in primary education has been deepened; the frequency of using methods of visualization of educational information and didactic visual tools in the lessons of Linguistic and Literary, Mathematical, Natural, Civil and Historical, Social and Health-saving educational fields has been increased; the range of digital visualization tools that teachers use in their professional and pedagogical activities has been expanded; the creative component in the activities of teachers and classes in visualizing educational information has been improved.

The development of teachers has affected the level of academic achievement of their students. This is evidenced by both the results of conversations with teachers and the assessment of their students' educational achievements. Based on the results of the study, we note the improvement in the students' performance indicators. Cross-sections of students' knowledge and skills in visualizing information and processing visual content within the language, literary and mathematical fields indicate their significant positive dynamics.

Thus, we can draw a general conclusion that the level of skills to visualize educational information among primary school teachers in Ukraine plays a crucial role in overall learning outcomes of primary school students. Therefore, enhancing the development of these skills among primary school teachers will contribute to the improvement of visual literacy in primary school students.

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## KO VALSTS PĀRBAUDES DARBI RĀDA PAR SKOLĒNU SNIEGUMU PAMATSKOLU BEIDZOT DAŽĀDĀS PAŠVALDĪBĀS?

### *What Do National Tests Show About Students' Performance at the End of Primary School in Different Municipalities?*

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**Abstract.** *One of the key principles of education policy is equal opportunities for children to access quality education. This principle applies not only to the allocation of resources but also to the equality of educational outcomes at both the individual and social group levels. This study analyses students' (15–16 years old) performance in the national examinations (centralised examinations of school year 2022/2023) in Latvian, mathematics, and the first foreign language (English) at the end of compulsory education in the context of different municipalities. Students' performance was analysed within 43 municipalities using classical test theory and test-response theory (Rasch model). In most municipalities, students' performance on the national test in mathematics, Latvian language and the first foreign language (English) is in line with average performance. The results of the national examinations show a geographical correlation in the distribution of students' performance between municipalities. High performance is mainly found in some municipalities of the Baltic Sea Region, and in mathematics, also in Riga. No geographical correlation was found in the municipalities with low performance in mathematics, while low performance in Latvian and English was found in several municipalities in the Latgale region. The comparison of the performance of educational institutions in the national examination shows that there are significant differences not only between municipalities but also between educational institutions within the same municipality. The analysis of the results indicates significant risks of unequal opportunities for access to quality education. This is particularly the case in the country's largest cities: Riga, Daugavpils, and Jelgava.*

**Keywords:** *education equity, national test, student assessment, student performance.*

## Ievads *Introduction*

Izglītības kvalitāte ir būtiska katra skolēna attīstīšanai, kā arī plašākas sabiedrības vajadzību apmierināšanai. Kopš 2018. gada Latvijā izglītības kvalitātes uzlabošanas nolūkos mērķtiecīgi virzīta tādas mācīšanas un mācīšanās iedibināšana skolu ikdienas praksē, kas atbilst 21. gadsimta vajadzībām un kas rezultējas skolēna kompetencē (Čakāne & Butkēviča, 2018). Skolēni pirmo reizi 2023. gadā kārtoja valsts pārbaudes darbus 9. klasē un vidējās izglītības posmā atbilstoši pilnveidotam mācību saturam. Trīs gadu laikā (no 7. līdz 9. klasei) viņi ir arī mācījušies atbilstoši pilnveidotam mācību saturam un pieejai.

Izglītības kvalitātes pārraudzības decentralizācija Latvijā, līdzīgi kā citur pasaulē, ir radījusi pieprasījumu pēc rīkiem un pieejām skolu un pašvaldības līmeņos vērtēt savas darbības efektivitāti, t.sk., inovāciju ieviešanā, un meklēt risinājumus pilnveidei (Burgmanis, 2023). Viena no pieejām ir valsts pārbaudes darbu (centralizēto eksāmenu) analīze, kura skolām un pašvaldībām signalizē ko skolēni ir apguvuši un ko skolēniem ir svarīgi apgūt. Skolēnu sniegums valsts pārbaudes darbos ir nozīmīgs datu avots lēmumu pieņemšanai skolas, pašvaldība un sistēmas līmeņos un dod iespēju analizēt skolēnu sniegumu pret dažādiem kritērijiem. Valsts pārbaudes darbu rezultātu analīze pašvaldības līmenī ļauj secināt par inovāciju ieviešanas progresu un efektivitāti, kā arī konstatēt potenciālās nepilnības, kuras var liecināt par nevienlīdzīgiem kvalitatīvas izglītības pieejamības riskiem skolās un pašvaldībās un norādīt uz izglītības resursu nevienmērīgu sadalījumu.

Šī pētījuma mērķis ir analizēt vienlīdzīgas iespējas skolēniem apgūt pilnveidoto mācību saturu Latvijas pašvaldībās un pašvaldību ietvaros, izvērtējot skolēnu sniegumu valsts pārbaudes darbos 2022./2023. mācību gadā pamatzglītības posma noslēgumā (9. klasi) pašvaldības griezumā.

## Literatūras apskats *Literature review*

Viens no galvenajiem principiem izglītības politikā ir vienlīdzīgas bērnu iespējas kvalitatīvas izglītības pieejamībai. Šis princips ir attiecināms ne tikai uz resursu sadalījumu, bet arī uz izglītības rezultātu vienlīdzību gan individuālajā, gan sociālās grupas līmenī (Sahlberg & Cobbold, 2021). Zinātniskā literatūra un pētījumi par izglītības pārvaldības jautājumiem akcentē pašvaldību lielo nozīmi un ietekmi uz izglītības politikas īstenošanu skolas līmenī, arī īstenojot nacionāla mēroga izglītības reformas, un atzīmē nepieciešamību veikt tālāku pētniecību par atbildībām un attiecībām starp dažādiem izglītības pārvaldības līmeņiem – skolas, pašvaldības, valsts līmeni (Adolfsson & Alvunger, 2020; Rorrer et al., 2008). Pašvaldību nozīmīguma pieaugums un ietekme uz skolas līmeņa procesiem ir

saistāma arī ar valstu pieeju lēmumu pieņemšanas pilnvaru sadalījumam starp valsts, pašvaldības un skolas līmeni, virzoties uz izglītības sistēmu decentralizāciju (Saleniece & Namsone 2023). Tādās valstīs kā Zviedrija, Nīderlande, Somija, Kanāda pēdējās desmitgadēs notikušas reformas, kas ir stiprinājušas reģionāla vai pašvaldības un skolas līmeņa autonomiju un atbildību par lēmumu pieņemšanu attiecībā uz mācību satura, finanšu un cilvēkresursu jautājumiem, ņemot vērā, ka skolas un pašvaldības vislabāk spēj izprast un novērtēt pašreizējo situāciju, aktuālos risināmos jautājumus un to risināšanai nepieciešamos resursus (OECD, 2018). Tāpat noteiktas izglītības politikas, reformu iniciatīvas stimulē pašvaldību nozīmīguma pieaugumu un decentralizācijas tendenci (Wahlström & Sundberg, 2017).

Pārmaiņu ieviešanas kontekstā izglītībā jau vairāk nekā pēdējo desmitgadi pētnieki aktualizē nepieciešamību izmantot datus lēmumu pieņemšanā, lai plānotu attīstības risinājumus skolas un pašvaldības līmenī (Mandinach, 2012). Plānojot attīstības risinājumus skolas vai pašvaldības līmenī, datu izmantošana arvien nav izplatīta prakse (Grissom u.c., 2017; Slavin u.c., 2013). Datu izmantošanas pozitīvā ietekme izglītībā visos līmeņos (no izglītības politikas veidotājiem līdz skolotājiem), lai plānotu attīstības risinājumus, ir pētnieciski pierādīta (McNaughton et al., 2012, Poortman & Schildkamp, 2016). Datu izmantošana lēmumu pieņemšanā ļauj būtiski mazināt intuitīvo pieņēmumu un subjektīvā pieredzē balstītu lēmumu ietekmi uz finanšu, administratīvo un cilvēka resursu plānošanu un precīzāk identificēt attīstības virzienus, kuros nepieciešams veikt uzlabojumus (Schildkamp et al., 2017, Mandinach & Schildkamp, 2021).

Latvijā nozīmīgs datu avots skolas un pašvaldības līmenī lēmumu pieņemšanai izglītības kvalitātes kontekstā un inovāciju ieviešanā ir valsts pārbaudes darbu rezultāti. Tomēr ļoti bieži to analīze izpaužas kā skolēnu, skolas vai pašvaldības vidējā snieguma analīze (Burgmanis & Pestovs, 2023). Pētījumi liecina, ka vidējā vērtējuma vai grūtības pakāpes, kura izteikta procentos, izmantošana (vidējā snieguma pieeja) var būt ļoti neprecīzs veids, kā analizēt skolēnu sniegumu (Wiliam, 2011, Guskey, 2013) un šāda pieeja nav izmantojama, lai pieņemtu lēmumus par atbalsta pasākumiem dažādos sistēmas līmeņos. Ievērojami precīzāks veids kā salīdzināt skolēnu sniegumu starp skolām un pašvaldībām ir salīdzināt skolēnu grupas vidējo sniegumu ar reprezentatīvas kopas vidējo rezultātu, izmantojot standartnovirzi (Burgmanis & Pestovs, 2023). Roberts Hess un Robins Pems norāda, ja skolēnu daļa, kuras sniegums ir zems vai ļoti zems, ir lielāka par 20 % no klases populācijas, nepieciešams pārskatīt pamata mācīšanas paņēmienus, nevis plānot specifisku atbalstu skolēnu grupai (Hess & Robbins, 2012).

## **Pētījuma metodoloģija** *Methodology*

### ***Datu avots*** ***Data collection procedure***

Pētījumā izmantoti anonimizētie dati par 2022./2023. mācību gada 9. klases (15-16 gadi) skolēnu sniegumu matemātikas (N=18067), latviešu valodas (N=18059) un pirmās svešvalodas (angļu valodas) (N=18051) valsts pārbaudes darbu publiski pieejamie dati Valsts izglītības satura centra mājas lapā par skolu vidējo sniegumu atbilstošajos valsts pārbaudes darbos.

### ***Datu analīze*** ***Data analysis***

Valsts pārbaudes darbu atbilstību jeb piemērotību skolēnu kopai analizē, izmantojot testelementa atbildes teoriju (Boone et.al., 2003).

Pētījuma ietvaros dati analizēti salīdzinot skolēnu sniegumu starp 43 pašvaldībām, izmantojot, klasiskās testa teorijas (*angl. Classical Test Theory*) un testelementu atbildes teorijas (*angl. Item Response Theory*) principus.

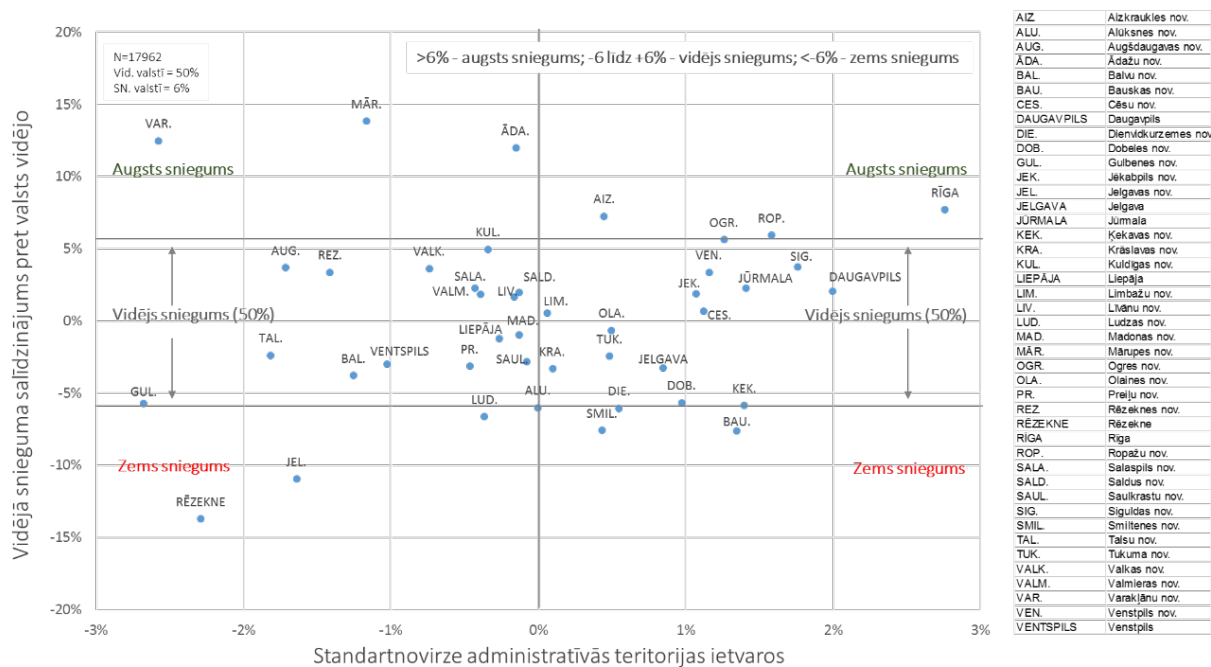
Lai demonstrētu skolēnu snieguma atšķirības starp pašvaldībām, aprēķināts katras pašvaldības skolēnu vidējais sniegums un tas salīdzināts ar reprezentatīvas kopas vidējo rezultātu jeb šī pētījuma ietvaros ar visu skolēnu populāciju, izmantojot standartnovirzi (Burgmanis & Pestovs, 2023). Vienas standartnovirzes intervālā rezultāti interpretēti kā vidēji, divu standartnoviržu intervālā – kā augsti vai zemi, bet, pārsniedzot divas standartnovirzes kā ļoti augsti vai ļoti zemi.

Lai demonstrētu skolēnu snieguma izkliedi pašvaldības ietvaros un identificētu nevienlīdzīgas izglītības riskus starp pašvaldībām un pašvaldību ietvaros, aprēķināta skolēnu snieguma standartnovirze katrai pašvaldībai un salīdzināta pret vidējo kopas standartnovirzi. Divu standartnoviržu intervālā nevienlīdzīgas izglītības pieejamības riski interpretēti – kā augsti vai zemi, bet, pārsniedzot divas standartnovirzes kā ļoti augsti vai ļoti zemi.

## **Pētījuma rezultāti** *Results*

Valsts pārbaudes darbu atbilstība/piemērotība 2022./2023. mācību gadā konkrētai skolēnu kopai 9. klases beigās, liecina, ka valsts pārbaudes darbs angļu valodā un latviešu valodā bija par vieglu, bet matemātikā daļai skolēnu bija par vieglu, bet daļai par grūtu. Tāpēc tiešā veidā salīdzināt skolēnu vidējo sniegumu valsts līmenī matemātikā un latviešu valodā ir sarežģīti, ņemot vērā valsts pārbaudes darbu atšķirīgu grūtības pakāpi.

Skolēnu vidējais sniegums 9. klases matemātikas valsts pārbaudes darbā valstī 2022./2023. mācību gadā bija 50 % ar standartnovirzi pašvaldību līmenī 6 % (1. attēls). Augsts sniegums konstatēts sešās pašvaldībās (Mārupes, Varakļānu, Ādažu, Aizkraukles, Ropažu novados un Rīgā), savukārt zems sniegums – septiņās pašvaldībās (Rēzeknes, Jelgavas, Ludzas, Smiltenes, Dienvidkurzemes, Alūksnes un Bauskas novados). Trīsdesmit pašvaldībās konstatēts skolēnu sniegums, kas atbilst vidējam sniegumam.



1. attēls. Skolēnu vidējais sniegums matemātikas valsts pārbaudes darbā 9. klasei pašvaldībās, salīdzinot ar valsts vidējo sniegumu, un sadalījums pēc standartnovirzes administratīvās teritorijas ietvaros (autoru veidots)

Figure 1 The average performance of the 9th grade students in local municipalities in the national test in mathematics, compared to the national average performance, and the distribution based on standard deviation within administrative territories (created by authors)

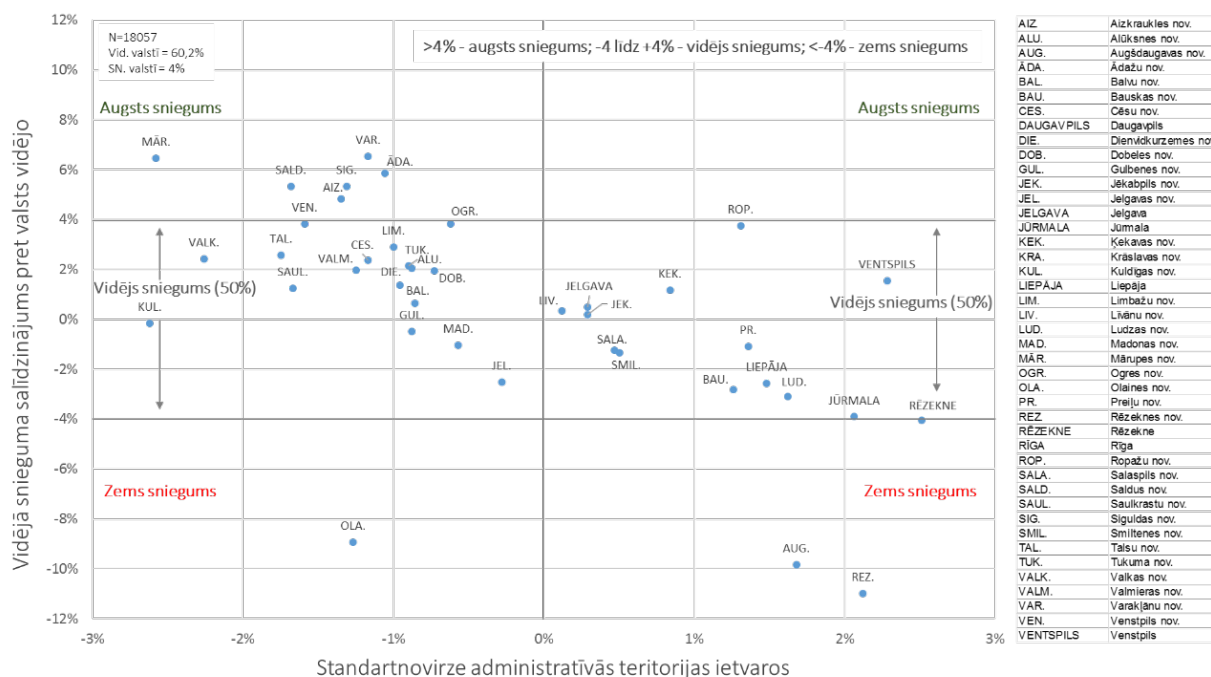
Skolēnu snieguma vidējā standartnovirze vienas pašvaldības ietvaros 9. klases matemātikas valsts pārbaudes darbā bija 25 % (1. attēlā atzīmēta ar 0 %). Standartnovirzes, kuras ir lielākas par +1 % no vidējās vērtības liecina par lielu skolēnu snieguma izkliedi pašvaldībā un +2% ļoti lielu. Savukārt, -1% no vidējās standartnovirzes par zemu skolēna snieguma izkliedi pašvaldībā, bet -2% ļoti zemu izkliedi. Lielākā standartnovirze pašvaldības ietvaros konstatēta Rīgā (gandrīz 28 %). Tāpat liela standartnovirze vērojama arī citās valstpilsētās (Jūrmalā, Daugavpilī, Ventspilī, Jelgavā), kā arī vairākos novados – Ogres, Ropažu, Bauskas, Cēsu. Zema standartnovirze konstatēta Mārupes, Jelgavas un Rēzeknes novados.



Saistīti interpretējot skolēnu sniegumu pašvaldībā salīdzinājumā ar vidējo sniegumu valstī un standartnovirzi pašvaldības ietvaros, var secināt, ka Rīgā, kur konstatēts augsts sniegums un liela standartnovirze, pastāv ievērojamas atšķirības starp skolēniem un skolām. Rīgas augsto sniegumu, salīdzinot ar vidējo sniegumu valstī, veido skolas un skolēni ar ļoti augstu sniegumu (piemēram, valsts ģimnāzijas), tā būtiski samazinot skolu un skolēnu ar zemu sniegumu ietekmi uz vidējo rezultātu.

Viendabīgi augstu sniegumu (augsts sniegums ar statistiski nelielām atšķirībām skolēnu sniegumā) uzrāda Mārupes novada skolas un skolēni, savukārt viendabīgi zemu sniegumu (zems sniegums ar statistiski nelielām atšķirībām skolēnu sniegumā) – Rēzeknes un Jelgavas novadu skolēni.

Valsts pārbaudes darbā latviešu valodā 9. klasei vidējais sniegums valstī 2022./2023. mācību gadā bija 60 % ar standartnovirzi pašvaldību līmenī 4 % (2. attēls). Augsts sniegums konstatēts sešās pašvaldībās (Mārupes, Varakļānu, Ādažu, Aizkraukles, Siguldas un Saldus novados), savukārt zems sniegums – piecās pašvaldībās (Rēzeknes, Krāslavas, Augšdaugavas, Olaines novados un Daugavpilī). Skolēnu sniegums, kas atbilst vidējam sniegumam valstī, konstatēts trīsdesmit divās pašvaldībās.



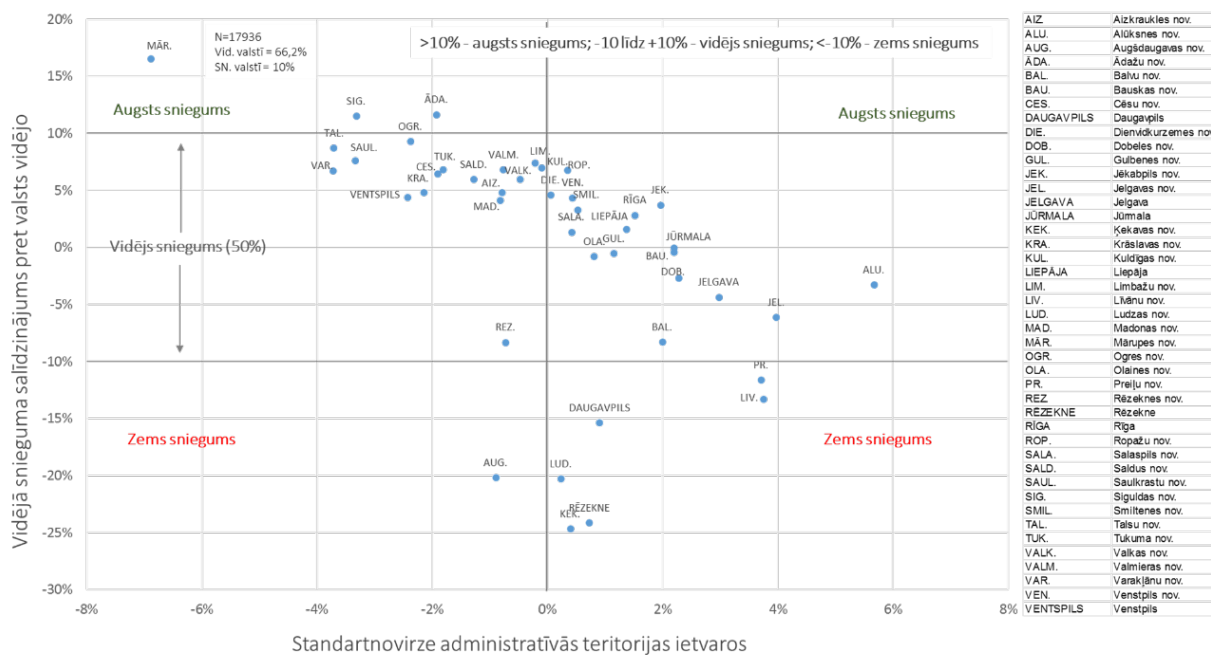
2. attēls. Skolēnu vidējais sniegums latviešu valodas valsts pārbaudes darbā 9. klasei pašvaldībās, salīdzinot ar valsts vidējo sniegumu, un sadalījums pēc standartnovirzes administratīvās teritorijas ietvaros (autoru veidots)

Figure 2 The average performance of the 9th grade students in local municipalities in the national test in Latvian language, compared to the national average performance, and the distribution based on standard deviation within administrative territories (created by authors)

Skolēnu snieguma vidējā standartnovirze vienas pašvaldības ietvaros latviešu valodas valsts pārbaudes darbā 9. klasei bija 16 % (2. attēlā atzīmēta ar 0%). Standartnovirzes, kuras ir lielākas par +2 % no vidējās vērtības liecina par lielu skolēnu snieguma izkliedi pašvaldībā un +4% ļoti lielu. Savukārt, -2% no vidējās standartnovirzes par zemu skolēna snieguma izkliedi pašvaldībā, bet -4% ļoti zemu izkliedi. Liela standartnovirze pašvaldības ietvaros konstatēta Krāslavas un Rēzeknes novados (> 18 %). Tāpat liela standartnovirze vērojama arī valstpilsētās (Jūrmalā, Daugavpilī, Ventspilī, Jelgavā, Rēzeknē, Rīgā). Zema standartnovirze konstatēta Mārupes, Valkas un Kuldīgas novados (< 14 %).

Saisīti interpretējot skolēnu sniegumu pašvaldībā, salīdzinot ar vidējo sniegumu valstī un standartnovirzi pašvaldības ietvaros, var secināt, ka Daugavpilī, Krāslavas un Rēzeknes novados, kur konstatēts zems sniegums un liela standartnovirze, pastāv ievērojamas atšķirības starp skolēnu sniegumu. Šo pašvaldību sniegumu, salīdzinot ar valsti, veido skolas un skolēni ar ļoti zemu sniegumu, būtiski samazinot skolu un skolēnu ar augstu sniegumu ietekmi uz vidējo rezultātu.

Viendabīgi augstu sniegumu (augsts sniegums ar statistiski nelielām atšķirībām skolēnu sniegumā) uzrāda Mārupes novada skolas un skolēni.



3. attēls. Skolēnu vidējais sniegums angļu valodas valsts pārbaudes darbā 9. klasei pašvaldībās, salīdzinot ar valsts vidējo sniegumu, un sadalījums pēc standartnovirzes administratīvās teritorijas ietvaros (autoru veidots)

Figure 3 The average performance of the 9th grade students in local municipalities in the national test in English, compared to the national average performance, and the distribution based on standard deviation within administrative territories (created by authors)

Valsts pārbaudes darbā angļu valodā 9. klasei vidējais sniegums valstī 2022./2023. mācību gadā bija 66 % ar standartnovirzi pašvaldību līmenī 10 % (3. attēls). Augsts sniegums konstatēts trijās pašvaldībās (Mārupes, Ādažu un Siguldas novados), savukārt zems – septiņās pašvaldībās (Rēzeknes, Krāslavas, Augšdaugavas, Ludzas, Līvānu un Preiļu novados, Daugavpilī). Skolēnu sniegums, kas atbilst vidējam sniegumam valstī, konstatēts 33 pašvaldībās.

Skolēnu snieguma vidējā standartnovirze vienas pašvaldības ietvaros angļu valodas valsts pārbaudes darbā 9. klasei bija 22% (3. attēlā atzīmēta ar 0%). Standartnovirzes, kuras ir lielākas par +2 % no vidējās vērtības liecina par lielu skolēnu snieguma izkliedi pašvaldībā un +4% ļoti lielu. Savukārt, -2% no vidējās standartnovirzes par zemu skolēna snieguma izkliedi pašvaldībā, bet -4% ļoti zemu izkliedi. Liela standartnovirze pašvaldības ietvaros konstatēta Alūksnes, Jelgavas, Preiļu, Bauskas, Dobeles, Balvu, Jēkabpils un Līvānu novados (> 24 %). Tāpat liela standartnovirze vērojama arī valstpilsētās (Jūrmalā, Liepājā, Jelgavā). Zema standartnovirze konstatēta Mārupes, Talsu, Siguldas, Saulkrastu, Ventspils, Ogres un Varakļānu novados (< 20 %).

Saistīti interepretējot skolēnu sniegumu pašvaldībā, salīdzinot ar valsts vidējo un standartnovirzi pašvaldības ietvaros, var secināt, ka Preiļu un Līvānu novados, kur konstatēts zems sniegums un liela standartnovirze, pastāv ievērojamas atšķirības starp skolēniem un skolām. Šo pašvaldību sniegumu, salīdzinot ar valsti, veido skolas un skolēni ar ļoti zemu sniegumu, būtiski samazinot skolu un skolēnu ar augstu sniegumu ietekmi uz vidējo rezultātu.

Viendabīgi augstu sniegumu (augsts sniegums ar statistiski nelielām atšķirībām skolu un skolēnu sniegumā) uzrāda Mārupes un Siguldas novada skolas un skolēni.

## **Secinājumi** **Conclusions**

Latvijā un citur pasaulē pašvaldībām ir būtiska ietekme uz izglītības politikas īstenošanu skolas līmenī, arī īstenojot nacionāla mēroga reformas (Adolfsson & Alvunger, 2020; Rorrer et al., 2008). Dati par skolēnu sniegumu valsts pārbaudes darbos ir viens no informatīvi piesātinātākajiem datu avotiem klases, skolas, pašvaldības un sistēmas līmenī, lai pieņemtu lēmumus par atbalstu skolēniem un skolotājiem. Ievērojamas skolēnu snieguma atšķirības valsts pārbaudes darbos starp pašvaldībām un pašvaldību ietvaros var liecināt par nevienlīdzīgi kvalitatīvas izglītības pieejamības riskiem skolās un pašvaldībās un norādīt par izglītības resursu nevienmērīgu sadalījumu. Ilgtermiņā šāda situācija var būtiski veicināt sociālekonomiskās segregācijas padziļināšanos Latvijā starp dažādām administratīvajām teritorijām vai administratīvo teritoriju ietvaros. Pētījuma ietvaros veiktā 2023. gada datu analīze uzskatāmi parāda, ka šādi riski Latvijā jau ir izveidojušies pamatizglītības beigās.

Lielas atšķirības skolēnu sniegunā pašvaldību ietvaros konstatētas vairākās Latvijas lielajās pilsētās (matemātikā – Rīgā un Daugavpilī; latviešu valodā – Ventspilī, Jūrmalā un Rēzeknē; angļu valodā - Jūrmalā, Liepājā un Jelgavā). Vairākos gadījumos (valsts pārbaudes darbi matemātikā un angļu valodā) lielas atšķirības novērojamas arī skolēnu sniegunā novados. Tas liecina, ka skolēniem iespējas kvalitatīvi apgūt priekšmetu mācību saturu arī starp skolām pašvaldībās var būtiski atšķirties. Homogēnu sniegumu visos valsts pārbaudes darbos uzrādīja tikai Mārupes novada skolēni. Pētījuma rezultāti hipotētiski ļauj pieņemt, ka lielākas atšķirības novērojamas teritorijās, kurām raksturīga lielāka sociālekonomiskā dažādība, savukārt homogēnāku skolēnu sniegumu nosaka mazāka sociālekonomiskā dažādība administratīvajā teritorijā. Tomēr, lai šādu pieņēmumu apstiprinātu turpmāk būtu nepieciešams veikt padziļinātu pētījumu par sociālekonomisko faktoru ietekmi uz skolēnu sniegumu.

Neskatoties uz to, ka lielākajā daļā pašvaldību visos trīs valsts pārbaudes darbos 9. klasē skolēnu sniegums atbilst vidējam, pētījums liecina, ka pastāv ģeogrāfiskas sakarības skolēnu sniegunā. Augsts sniegums matemātikā raksturīgs galvenokārt Rīgā un atsevišķās Pierīgas pašvaldībās, savukārt pašvaldību ar zemu sniegumu ģeogrāfiskajā izvietojumā netika konstatētas sakarības. Valsts pārbaudes darbs latviešu valodā un angļu valodā augsts sniegums raksturīgs galvenokārt atsevišķās Pierīgas pašvaldībās, savukārt zems sniegums vairākās Latgales novada pašvaldībās.

Pētījuma rezultāti ir izmantojami, lai uzsāktu vairāku nozīmīgu pašvaldības līmeņa funkcijas izglītības reformas ieviešanu, t.sk., nodrošināt mācību vadīšanu, pārorientēt organizāciju, nodrošināt rīcībpolitikas saskaņotību, nodrošināt vienlīdzīgas izglītības iespējas (Rorrer et al., 2008; Saleniece & Namsone, 2023). Tie ļauj pašvaldībās izglītības ekspertiem uzsākt datus un pētniecībā balstītu lēmumu pieņemšanas procesu; plānot attīstības risinājumus pašvaldība un skolu mērogā, lai mazinātu nevienlīdzīgi kvalitatīvas izglītības pieejamības riskus. Rezultāti uzrāda pašvaldības, kurās nepieciešams uzsākt padziļinātu situācijas analīzi (piem., sociāli ekonomisko faktoru ietekmi uz skolēnu snieguma atšķirībām starp skolām), plānot metodiskās intervences pasākumu kopumu atšķirību mazināšanai un investēt resursus praktiskā intervences realizēšanā.

## Summary

The study analyses student performance in national tests at the end of primary school in different municipalities in Latvia. The study uses classical test theory and item response theory principles to compare student performance among 43 municipalities. The study calculates the average student performance of each municipality compared to the national average and the standard deviation of student performance within and among municipalities. The results show that there are significant differences in student performance among municipalities,

with some municipalities having consistently high or low performance across different subjects. The study concludes that the use of average grades or percentage grades to analyse student performance can be imprecise and not suitable for decision-making at different levels of the education system. Instead, the study suggests that analysing student performance data at the municipality level can help identify potential inequalities in the distribution of educational resources and inform interventions to reduce these inequalities. The study also highlights the importance of using data-driven decision-making to improve the quality of education and reduce the risk of unequal access to quality education. The results of this study can be used to make data-driven decisions to reduce the risk of unequal access to quality education in different municipalities in Latvia. Overall, this study provides valuable insights into the performance of students in national tests in Latvia and highlights the importance of using data-driven decision-making to improve the quality of education and reduce inequalities in access to quality education.

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# THE IMPORTANCE OF TEACHERS' LEADERSHIP SKILLS DEVELOPMENT FOR SUCCESSFUL ORGANIZATIONAL CULTURE IN EDUCATIONAL INSTITUTION

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**Abstract:** *Discussions of the quality and effectiveness in education have become topical today. There are different challenges faced by teachers and school leaders at the primary, lower secondary, secondary and upper secondary levels. Therefore, it must be recognised that leadership skills are becoming important for the successful organisation of learning at all stages of education. The relevance of leadership skills is accentuated by the rapidly changing environment of change that also characterises the field of education. In the 21st century, leadership can be associated as a pedagogical and a managerial skill. Leadership skills and openness to change contribute to the growth of an educational institution, and this growth is at the heart of a successful organisational culture. It fosters a genuine concern for the growth of every employee, as well as an institution-driven vision, coherence, ownership, mentoring, accountability and support. These are employees with developed leadership skills who change and transform the system, because no organisation can exist without change. The aim of this publication is to describe and evaluate the impact of leadership skills and openness to change on the development of a successful organizational culture in the educational institution, and to highlight the need for the development of teachers' leadership skills.*

**Keywords:** *growth of every employee, leadership skills, teacher, organizational culture in educational institution, openness to change.*

## Introduction

The 21st century is a time of change and the culture of the workplace is constantly changing. It is understanding the dynamic nature of the workplace that helps educational staff to keep pace with change (Herrity, 2022). Regular professional development and self-reflection for both the educational staff and the manager, as well as goal-oriented collaboration, shared mission and vision building become important for implementing quality change in the educational institution and leadership skills (Mlinarević, Tokić, Cvjetičanin, 2022).

Although leadership skills are often seen as abstract and unrelated to school work, teachers' leadership skills are developed directly in the classroom with

their students, and students' academic achievement is strongly related to teachers' leadership skills (Bolkan & Goodboy, 2009, 11). Communication and analytical thinking, problem solving, critical and creative thinking, time management, decision making and other important skills are important for a leader. The need for leadership skills becomes particularly acute in the process of implementing reforms, so the leadership skills of not only the manager but also the staff largely determine the openness of the whole educational institution to change (Xu & Patmor, 2012, 253). In the process of implementing any innovation, it is not only important to increase knowledge and understanding of new approaches and methods, but it is also important to implement these processes in a well-organised and disciplined way, which involves formulating new goals and working towards them together, implementing innovative and scientifically sound methods, reflecting on the benefits and opportunities for improvement (Kapur, 2022). As an agent of change, the teacher is characterised by openness to change and readiness to learn (Dudareva, 2018). Transformative leadership can involve both significant and seemingly insignificant actions with enormous impact. They can be small actions, gestures, even a word spoken casually or thoughtlessly can have a big impact on a person and the whole organisation (Montuori, Donnelly, 2018).

The aim of this publication is to describe and evaluate the impact of leadership skills and openness to change on the development of organisational culture in an educational institution, and to highlight, based on empirical research, the need for developing leadership skills in teachers.

### **Developing teachers' leadership skills in an organisational culture focused on improving the quality of education**

Kumi Yeboah (2012) emphasises that "it takes time, dedication, hard work and learning to develop teachers' professional competence" (Yeboah & James, 2012, 170), but it is also essential to be aware of fostering collaboration with different stakeholders in the educational process to improve learning (Branch, Hanushek & Rivkin, 2013), a shared vision for the future of the educational institution, as well as a sense of moving towards a goal. Mlinarević, Tokić & Cvjetičanin (2022) also emphasise a drive towards common goals based on mutual respect, continuous learning, participation and ownership of the quality of the learning process (Mlinarević, Tokić & Cvjetičanin, 2022).

The beliefs and values of staff members are at the heart of an educational institution's organisational culture. It is an organisational culture based on values and the drive for qualitative change that reduces the need for formal rules, as the intrinsic motivation of employees is strengthened (Mlinarević, Tokić, Cvjetičanin, 2022). Creating a collaborative learning environment also becomes important. Stoll & Fink (1996) emphasise that organisational culture is both a



product (organisational achievements) and a process (organisational development (including traditions), as well as a drive towards employee self-direction). Its functions are: boundary-setting function (delineating differences between organisations, including the uniqueness of the institution, the individual talents of employees and the development of professional competence to achieve the organisation's common goals); development of collective belonging (maintaining the traditions of the educational institution and introducing new traditions); internal rules of order binding on all (Mlinarević, Tokić, Cvjetičanin, 2022).

Creating an organisational culture is a process of co-construction involving all staff, as well as students, parents, education policy makers and partners. Not only the acceptance and reinforcement of traditions and values, but also openness to innovation is important in achieving the overall goals of an educational institution (Xu & Patmor, 2012). Innovation, creativity, finding new and innovative solutions to problems, confidence and openness to new ideas, fostering a positive, open, innovative and transformative organisational culture are essential for today's leaders (Mlinarević, Zec, & Cvjetičanin, 2022).

### **The Description of Teachers' Leadership Skills**

For today's teacher, it is the responsibility for achieving common goals (Bolkan & Goodboy, 2009) that becomes particularly relevant, knowing that they "create and lead, transforming themselves and the world" (Montuori & Donnelly, 2018). An integral part of leadership is the decision-making process in professional work. Teachers make decisions on a daily basis about teaching and learning methods, teaching materials, strategies, learning environments, etc. The choice of the most appropriate and valuable alternative is also important (Kapur, 2022). It is essential for every teacher to be aware that he or she "creates and leads, transforming themselves and the world" (Montuori, Donnelly, 2018, 3). Warren (2021) in "Teacher Leadership Begins with Self-Leadership", reveals that teachers need to start by developing self-leadership skills to foster personal growth. Self-leadership is the awareness of oneself, one's strengths and feelings, as well as self-acceptance. Only then can a teacher effectively and responsibly manage his or her work both inside and outside the classroom. Developing self-leadership skills is important not only for improving performance but also for personal development and life enrichment (Warren, 2021).

Two forms of leadership can be highlighted in the learning process: administrative leadership and pedagogical leadership (planning teaching and learning, supporting professional development, building trusting relationships with staff, fostering mutual learning, structuring and organising professional work, creating a supportive environment, etc.) (Douglass, 2019). At the same time, the leadership structure can also be characterised as: shared (sharing

responsibilities and taking responsibility) and hierarchical (authoritarian leadership style) (Douglass, 2019). It is the shared leadership in an educational institution that contributes to a large extent to employee engagement, motivation and openness to change, becoming agents and facilitators of change (Kangas, Venninen & Ojala, 2015).

The importance of transformative skills and competences has also been highlighted (Montuori & Donnelly, 2018). An important transformational skill is transformational leadership or change leadership skills, which include: employee awareness of organizational growth opportunities, employee intrinsic motivation, problem-solving skills, autonomy and effectiveness (Bass, 2008), quality of collaboration, quality work environment (Hafsari, Aslamiah & Rachman, 2021) and positive relationships among employees (Mlinarević, Tokić, Cvjetičanin, 2022). At the same time, mentoring programmes (Wong, 2015, 42) and a positive emotional background (Hallowell, 2011) become relevant for the development of transformative leadership skills, for which strategies for overcoming disagreements/conflicts in the educational institution; individual approach to each employee and joint pedagogical discussions become important (Hallowell, 2011). Clearly, the presence of transformative leadership in an educational institution facilitates change (see Table 1).

*Table 1 The relevance of transformative leadership for the development of a learning and development-oriented organisational culture in an educational institution  
(made by authors)*

<b><i>The impact of transformative leadership</i></b>	<b><i>Changes at an educational establishment</i></b>
Openness to change (Montuori & Donnelly, 2018)	Show the courage to change the world (Brown, 2006)
Ability to adapt to different life situations/tasks (Montuori & Donnelly, 2018)	Staff develop problem-solving skills (Bass, 2008)
Staff develop problem-solving skills (Bass, 2008)	Staff autonomy and efficiency are promoted (Bass, 2008)
Positive emotional background (Hallowell, 2011)	Building respectful relationships (Mlinarević, Tokić, Cvjetičanin, 2022)
Moving towards common goals (Tokić, 2022)	Promoting a shared vision (Hey, 2006); Developing a shared mission and vision (Mlinarević, Tokić, Cvjetičanin, 2022)
Developing collaborative skills (Bass, 2008)	The ability to reflect, to think critically (Mezirow, 1991)

However, it is also important to recognise that the leadership skills of the staff of an educational institution depend to a large extent on the leadership skills of the head of the educational institution (Bolkan & Goodboy, 2009). In order to facilitate the development of leadership skills in preschool teachers, the preschool teacher needs to start by developing the skills of self-leadership,

which is self-acceptance, awareness of one's strengths and feelings, in order to promote personal growth. Only by developing self-leadership is a teacher able to effectively and responsibly manage their work both in and out of the classroom, contribute to improving their performance and personal development for life enrichment (Warren, 2021). Shared sharing of responsibilities and accountability is also important, as is shared leadership, which is characterised by transparency, promotion of autonomy and openness to new ideas (Kangas, Venninen & Ojala, 2015).

### **Methodology**

In order to conduct an empirical analysis of preschool teachers' leadership skills in the context of the competence approach, a survey of preschool teachers was implemented, as "a specific feature of a survey is the possibility to ask a larger number of questions in writing and to receive responses from a larger number of subjects" (Kamerāde, Mārtinsons, Pipere, 2016). The survey was implemented online. Statistical processing of the survey data was implemented for validity using a predictive analytics and statistical analysis software package (IBM 81 SPSS v.22 Results are considered statistically significant if  $p$  (statistical significance)  $< 0.05$ ). The survey was conducted from 1 January 2023 to 30 January 2023. The survey was carried out among 271 respondents from different regions of Latvia (Kurzeme, Vidzeme, Zemgale, Riga and Latgale). All respondents were pre-school teachers.

### **Results**

The study involved an online survey of pre-school teachers and administrators. 271 respondents took part.

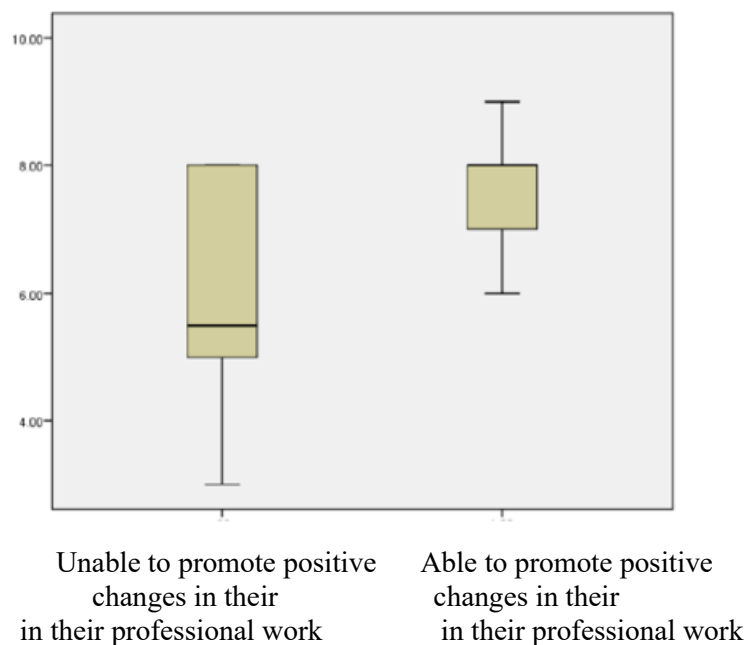
93% of the respondents were preschool teachers, including methodologists, speech therapists, music and special educators, 4.4% preschool managers and 2.6% deputy preschool managers. 11.8% or 32 respondents work in the private sector, and 88.2% or 239 in municipal institutions. The questionnaire was sent to the 5 preschool institutions of the study base. All of the schools in the study base are preschools in the Riga region. The master sample consists of 374 respondents.

The majority of respondents - 86 (31.7%) - have 15 or more years of experience, 47 (17.3%) have 10-14 years of experience, 64 (23.6%) have 5-9 years of experience, and the remaining 72 (26%) have 4 or less years of experience in the field of education.

Analysing the age of the respondents and relating it to the generational theory, it was found that the majority of 154 (56.8%) teachers were born between 1981-2000, 111 (41%) were born between 1961-1980 and 4 (1.5%)

were born between 1946-1960. One teacher born between 2001-2014 and one teacher born between 1923-1945 also participated in the survey.

The context of changes in the Latvian education system has already been highlighted, but the survey data show that only 7 (2.6%) respondents believe that the changes implemented in the Latvian education system are qualitative, while 49 (18.1%) respondents are convinced that they are "completely dissatisfied" with the ongoing changes, 136 (50.2%) respondents are more than dissatisfied, while 79 (29.2%) respondents are almost satisfied. Thus, it can be concluded that the majority of respondents are dissatisfied with the reforms and changes in the Latvian education system, such as the implementation of the competences approach to curriculum learning.



*Figure 1 Relationship between respondent's statement that he/she is able to promote positive change in his/her professional work and respondent's subjective leadership score (1-10) (N=271) (made by authors)*

The Mann-Whitney test revealed that respondents who believe they can promote positive change in their professional work have a higher median subjective leadership score (Median 8, IQR 1) than respondents who do not believe they can promote positive change in their professional work (Median 5.5, IQR 3.25,  $Z=-2.257$ ,  $p=0.024$ ) (see Figure 1). Thus, the findings revealed that it is leadership skills and openness to change that contribute to the growth of an educational institution and it is also the drive towards growth that underpins a successful organisational culture (Mlinarević, Tokić & Cvjetičanin, 2022, 105).

## **Conclusions**

1. Education reforms are largely motivated by a change in the values of education. Teachers' lack of openness to change, lack of knowledge, understanding and time planning, and lack of ownership can be a hindering factor in the implementation of reforms.
2. Moral values are becoming relevant in the development of an organisational culture. In the process of developing an organisational culture of learning and development, the purposeful and systematic, collaborative implementation of positive change and innovation, focusing professional work in the educational institution on the management of student learning, becomes relevant. The goal-setting is linked to the recognition of the importance of the results of each employee's work in the overall work.
3. Developing leadership skills at all stages of education must be seen in the context of constant change. Transformative leadership is therefore becoming relevant. The leadership skills of the staff of an educational institution depend to a large extent on the leadership skills of the head of the educational institution, as the responsibility for achieving common goals becomes relevant in an educational institution. In order to foster the leadership skills of pre-service teachers, the development of self-leadership - self-acceptance, awareness of one's strengths and feelings, skills for personal growth - becomes important. Only by developing self-leadership is a teacher able to effectively and responsibly manage his/her work both in and out of the classroom, to contribute to the improvement of his/her performance and to the enrichment of his/her personal life.

## **Summary**

Leadership skills development is not facilitated by employees' belief that leadership skills are only necessary for employees in managerial positions, so it is very important for the head of the educational institution to encourage the use of the potential of his/her employees. Organisational culture is a process of co-construction involving all employees of an educational institution. The more pronounced the organisational culture, the less need there is for formal rules and the more intrinsic motivation is promoted. In pre-primary education, the development of an organisational culture geared towards learning and development is also becoming particularly relevant, as children and adults are involved in improving the quality of education, creating a shared learning environment and working together to achieve goals. In the 21st century, leadership is valued as both an important pedagogical and managerial skill. The terms 'manager' and 'leader' are often used synonymously, but the manager of an

educational institution may not always possess the necessary leadership skills to promote positive change in the educational institution and an organisational culture focused on learning and development. Leadership skills are necessary for everyone in an educational institution, as they contribute to an institution's growth-driven vision, coherence, ownership, debate, creativity, responsibility and support, collaboration skills, self-confidence, professional competence, analytical thinking, problem solving, critical and creative thinking, time management and decision-making.

Developing self-leadership skills, which is awareness of oneself, one's strengths and feelings, as well as self-acceptance, is crucial to developing leadership skills. In the teaching-learning process, the most popular forms of leadership are: administrative and pedagogical leadership, but an analysis of the structure of leadership shows that, in contrast to hierarchical leadership, shared leadership, which is the sharing of responsibilities and responsibilities, is becoming a trend today. It ensures better organisational performance. Shared leadership is characterised by transparency, promotion of autonomy and openness to new ideas, employee involvement and motivation. Reflection, critical thinking, creating new knowledge and actively reflecting on one's own learning are essential for developing transformative or change leadership skills. Discussions between the institution's staff and a positive emotional background become important in developing transformational leadership. Also important is the sustainability of leadership, which is facilitated by the setting and achievement of long-term goals as opposed to performance and short-term targets; shared responsibility as opposed to a hierarchical leadership structure; and the evaluation of the educational institution in terms of progress and future needs.

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## PHYSICAL EDUCATION OF SECONDARY SCHOOL STUDENTS USING ULTIMATE FRISBEE

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**Abstract.** *The article theoretically substantiates, develops, experimentally verifies the effectiveness of Ultimate Frisbee authors' training program for secondary school students to improve fitness level. There was positive dynamics in fitness level in the experimental group. The research aim is to determine the effectiveness of Ultimate Frisbee equipment use in physical education of secondary school students. The fitness level has been determined and the effectiveness of the Ultimate Frisbee program in physical education of secondary school students was verified. 45 schoolchildren were engaged into the study. Research methods: literary sources analysis; methods of obtaining empirical data (determining fitness level by T. Krutsevich methods); pedagogical experiment; mathematical statistics methods. The program to introduce Ultimate Frisbee into the physical education lessons for secondary school students has been presented and scientifically substantiated. The content of the program included studying the history of the game, the basics of game technique and tactics, how to play Ultimate Frisbee, refereeing rules; development of competitive activity skills; increasing fitness level. The developed program has been implemented into the educational process and its effectiveness has been proven. The results of the study showed the positive effect on secondary school students fitness level, which was confirmed by the mathematical statistics methods.*

**Keywords:** *fitness level, secondary school students, Ultimate Frisbee.*



## **Introduction**

Nowadays the problem of preserving and strengthening the health of the young generation is gaining special relevance. This is due to the fact that currently about 90% of schoolchildren have deviations in their health status, every fifth is assigned to a preparatory or special medical groups, and more than 70% of schoolchildren have a low and below average level of somatic health (Khanikiants, Konestyapin, Rymar, Yaroshyk & Sorokolit, 2021). The given statistics indicate the need to introduce innovative means and methods of physical education in order to increase the effectiveness of physical education lessons, since they are the main form of organization of the physical education process in general educational institutions (Traykova, 2021; Zavydivska, Rymar, Khanikiants, Malanchuk & Solovey, 2021). One of these modern types of motor activity is Ultimate Frisbee, which, in our opinion, will be able to improve the health, increase fitness level and the level of development of physical qualities of secondary school children. The research aim is to determine the effectiveness of Ultimate Frisbee equipment use in physical education of secondary school students. The following research methods were used: literary sources analysis; methods of obtaining empirical data (determining fitness level by T. Krutsevych methods); pedagogical experiment; mathematical statistics methods.

### **Analysis of recent research and publications**

New and modern sports, which have great prospects for development due to the game rules, in comparison with the traditional ones are gaining great popularity nowadays. These are sports that do not require a large involvement of technical staff, judges, volunteers and technical support. In our opinion, Ultimate frisbee is one of those.

Ultimate frisbee is a relatively young sport, dynamic, fast and tactically complex, which requires speed of thinking and decision-making. Taking up Ultimate frisbee provide the necessary level of motor activity, physical development, promote health, develop physical qualities and intellectual potential.

In the scientific literature, there is a lot of data related to the study of the competitive activity of Ultimate Frisbee (Krustrup & Mohr, 2015), the development of physical qualities (Kenedi & Sulaiman, 2018; Portillo, Bravo-Sánchez, Abián, Dorado-Suárez & Abián-Vicén, 2022); improving fitness parameters by Ultimate Frisbee (Miller, Eather, Lubans, & Duncan, 2018), Ultimate Frisbee in the preschool physical education curriculum (Traykova, 2021). Many scientific works are dedicated to technique improvement (Ahmadi, Booshehry & Reza Dostan, 2019), but there are practically no data related to the study of the impact of Ultimate Frisbee classes on secondary school children fitness level.

## **Materials and methods**

The research was conducted during 2022-2023. The fitness parameters of children aged 11-12(secondary school age students) were determined and the effectiveness of Ultimate Frisbee program was experimentally verified. 45 students (18 girls and 27 boys) were engaged into the research. The pedagogical experiment was conducted with secondary school age students (6th grade), who were assigned to the main educational department according to their health level. Physical education lessons with Ultimate Frisbee were conducted by a appropriately trained teacher.

To solve the goal, the following research methods were used:

- Analysis of literary sources was used to study the prerequisites for increasing the effectiveness of physical education lessons using Ultimate Frisbee.
- Methods of obtaining empirical data (determining the fitness level according to T. Krutsevych method), which involved the measurement of functional parameters and parameters of physical qualities development such as vital index (mL/kg) - the ratio of the vital capacity of the lungs to body weight; Ruffier index (relative units) – heart rate after relatively small loads with different recovery time; Robinson's index (relative units) – the product of heart rate and systolic blood pressure; strength index (relative units) - the ratio of the (stronger) hand strength to the body weight; speed-power index (relative units) - the ratio of the long jump result to the body length; speed index (relative units) – the ratio of the 30 meters speed running time to the body length; the reference standard for assessing the flexibility level is "Torse tilt". All the listed parameters were evaluated in relative units (points) according to T. Krutsevych fitness level determining method for children aged 11-12. We summarized the seven parameters results, compared them with the tabular scale and determined the fitness level of children aged 11-12 as low, below average, average, above average, high. The parameters were measured during school physical education lessons. The results were recorded in the protocols.
- Pedagogical experiment was used to check the effectiveness of the author's program “Ultimate Frisbee in physical education of secondary school age children”.
- Mathematical statistics methods. All statistical analyses were performed using SPSS Version 21. For each characteristic, average values, standard deviations, and student criterion for unrelated samples were determined. The 0.05 levels of probability were used to indicate statistical significance (Weir & Vincent, 2020).

## **Research results**

Ultimate Frisbee is a non-contact team sport with a disc that is actively developing all over the world. It can be practiced all year long, on any flat surface. All you need for the game is a plastic flying disc. The rules of the game are easy to remember. At the heart of Ultimate Frisbee is the "spirit of the game", the essence of which is reflected in the sporting phenomenon of "fair play", where players are guided by ethical and moral laws established for nobility and justice. A positive aspect is that Ultimate Frisbee can be practiced not only indoor, but also outdoor.

We have developed a physical exercises program with the use of Ultimate Frisbee for secondary school age children, the purpose of which was to increase their fitness level. The pedagogical experiment was conducted in 2022-2023. So, 24 students (12 girls and 12 boys) of the control group (CG) and 21 students (6 girls and 15 boys) of the experimental group (EG) were engaged.

Ultimate is non-contact sport. There are rules for mixed (male and female) teams. The main condition is the same number of boys and girls in a team. Therefore, during lessons, we divided the group by gender to avoid injuries, since at this age anatomical and physiological differences between boys and girls are already significant.

EG schoolchildren practiced according to the proposed program 3 times a week for 45 minutes in accordance with the schedule. CG schoolchildren studied according to the traditional physical education program, which included a section of volleyball.

The developed program provided for the solution of educational and health-related tasks, in particular studying and improving the technical elements of the game; physical qualities development; formation of skills to interact in a team; development of moral and volitional qualities; formation of interest and need for physical education.

The program included compulsory and optional components. The compulsory part included theoretical and methodological knowledge, general physical fitness. The content of the optional component included the study and practicing Ultimate Frisbee.

The program was developed for a 10 week period (30 lessons) and divided into two stages: preparatory (9 lessons - 3 weeks) and main (21 lessons - 7 weeks). Tasks of the preparatory stage were studying the rules of the game, learning the technique of main elements (throwing and catching technique, attack and defense tactics), as well as the formation of a persistent interest in physical exercises. The task of the main stage was to improve the schoolchildren fitness level (functional and physical readiness parameters; technical and tactical training in Ultimate Frisbee).

Each lesson had a traditional structure and consisted of preparatory, main

and final parts. The preparatory part involved setting tasks, organizing students and warm-up in order to prepare the bodies for future loads. The main part involved special exercises that contributed to the learning and improvement of Ultimate Frisbee skills. The final part involved the exercises aimed at cooling down. During the implementation of the program, the safety rules and preparation of the place for Ultimate Frisbee lessons were strictly observed.

Verification of the effectiveness of the experimental research work regarding the use of Ultimate Frisbee in the physical education of children of secondary school age was carried out in the process of control comparison of the results of the ascertaining and formative stages of the study.

During the experiment, the effect of the proposed program on the children aged 11-12 fitness level was determined. A general check of the results of the formative experiment was carried out, the reliability of the obtained data was determined. The analysis of the research results showed that at the beginning of the experiment there were no significant differences between the parameters of fitness level in CG and EG. This allows us to state that the groups were homogeneous at the beginning of the experiment.

The analysis of the fitness level parameters of children aged 11-12 and the changes during the experiment allows us to note that as a result of Ultimate Frisbee lessons, there were positive changes in a number of parameters (Table 1). Thus, the analysis of the results of the vital index, which serves as an assessment of the functional capabilities of the respiratory system, showed that during the experiment, the EG parameters increased by 3.28 mL/kg, which was confirmed by statistical reliability ( $t=2.62$ ;  $p<0.05$ ). The CG parameters also tended to increase by 2.15 mL/kg, but the result was unreliable ( $t=1.61$ ;  $p>0.05$ ). The statistical improvement of vital index parameters in EG was due to the inclusion of a large number of special running exercises, various accelerations, movements, jumps, which increase the volume of lung breathing, strengthen respiratory muscles and improve respiratory function in general.

During the experiment, there were positive changes in the parameters of the Robinson index, which characterizes the criteria for the reserve of the human cardiovascular system. Thus, the analysis of the results established that there was a significant improvement in the parameters of EG children in the course of the study ( $t=2.11$ ;  $p<0.05$ ), in particular, it increased by 4.29 points. Positive changes also occurred in CG children by 2.5 units, but they were less significant ( $t=1.29$ ;  $p>0.05$ ).

*Table 1 Fitness level parameters in experimental and control groups (made by authors)*

№	Parameters	Before experiment		After experiment		p
		CG	EG	CG	EG	
1.	Life index, mL/kg	44,41±1,2	44,03± 1,09	46,56± 1,11	47,31± 1,09	p<0,05
2.	Robinson index, relative units	88,71±1,65	89,17±1,61	86,21±1,70	84,88±1,91	p<0,05
3.	Ruffier index, relative units	11,16±0,43	11,26±0,49	10,20±0,44	9,81±0,41	p<0,05
4.	Strength index, %	49,24±1,09	48,01±1,10	51,67±1,2	51,81±1,13	p<0,05
5.	Speed and strength index, relative units	1,07±0,03	1,05±0,01	1,12±0,04	1,13±0,03	p<0,05
6.	Speed index, relative units	3,6±0,08	3,5 ±0,09	3,8±0,14	3,8±0,12	p<0,05
7.	Test exercise "Torse tilt ", cm	3,9±0,41	3,7 ±0,39	4,1±0,44	4,1±0,41	p>0,05

(n=45)

During the experiment, there were positive changes ( $t=2.78$ ;  $p<0.05$ ) in EG children and in the parameters of the Ruffier index, which evaluates the physical capabilities of schoolchildren and the body's adaptation to intense physical loads. On the other hand, we do not observe such significant improvements in children of CG ( $t=1.89$ ;  $p>0.05$ ). Such a statistical increase in the parameters of the Robinson index and the Ruffier index in EG children can be explained by the fact that Ultimate Frisbee is a highly dynamic sport, which is characterized by such types of movements as speed race, jumps in motion and with rotations, fast stops for various throws and catches. So it serves as a kind of cardio training, which requires considerable endurance and, as a result, improves the children's cardiovascular system function.

The study of strength index parameters determined a significant influence ( $t=2.77$ ;  $p<0.05$ ) of lessons on the development and improvement of hand muscle strength of EG children, since the Ultimate frisbee exercises mainly focus on throws (accuracy/range) and catching the disc with the hands. However, it is worth noting that there were also positive shifts in the strength index parameters of the CG children, but the observed changes are unreliable ( $t=1.94$ ;  $p>0.05$ ).

In the course of the study, the dynamics of the speed-power index of children 11-12 years old was analyzed. It was found that in the course of the experiment there was a significant improvement in the parameters of the children of both groups, in particular, we note an increase in the parameter by 0.02 points in the EG children ( $t=4.12$ ;  $p<0.05$ ), in CG children by 0.01 relative unit ( $t=2.44$ ;  $p<0.05$ ). We associate such changes with the fact that both Ultimate Frisbee and volleyball contain a sufficient number of various jumping exercises which strengthen the leg and trunk muscles.

EG students achieved a significant growth in the speed index, which increased from 3.5 units. up to 3.8 units ( $t=2.16$ ;  $p<0.05$ ) and it was confirmed by the reliability of the discrepancy between the results of CG and EG ( $p<0.05$ ). The improvement of EG children results can be explained by the fact that playing Ultimate Frisbee requires to react quickly to the opponents and partners actions, to change quickly the direction and speed of movements, the ability to accelerate, to perform defensive or offensive actions.

As a result of the experimental program, there were positive but unreliable changes in the parameters of the test exercise "torse tilt" in both groups children, in particular, in EG children the difference between the parameters was 0.4 cm ( $t=1.99$ ;  $p>0, 05$ ), in CG children - 0.2 cm ( $t=1.61$ ;  $p>0.05$ ). The above shows despite Ultimate Frisbee includes a large number of jumps, turns, twists, but this was not enough for a statistical increase in the results of children's flexibility development.

The specific parameters were evaluated in points according to T. Krutsevych method of children fitness level determining. According to the research results, it is established that systematic Ultimate Frisbee training allows to improve the fitness level. Before the experiment the value of EG children was estimated as "below average" (8.3 points), and after the experiment as "average" (15.1 points ) (Fig. 1). Although the fitness level of CG students increased during the experiment and it was defined as "below average" at the beginning and at the end of the experiment.

Thus, it can be stated that the developed program with the use of Ultimate Frisbee in the process of physical education of secondary school age children is effective and it can be applied to improve secondary school age children fitness level.

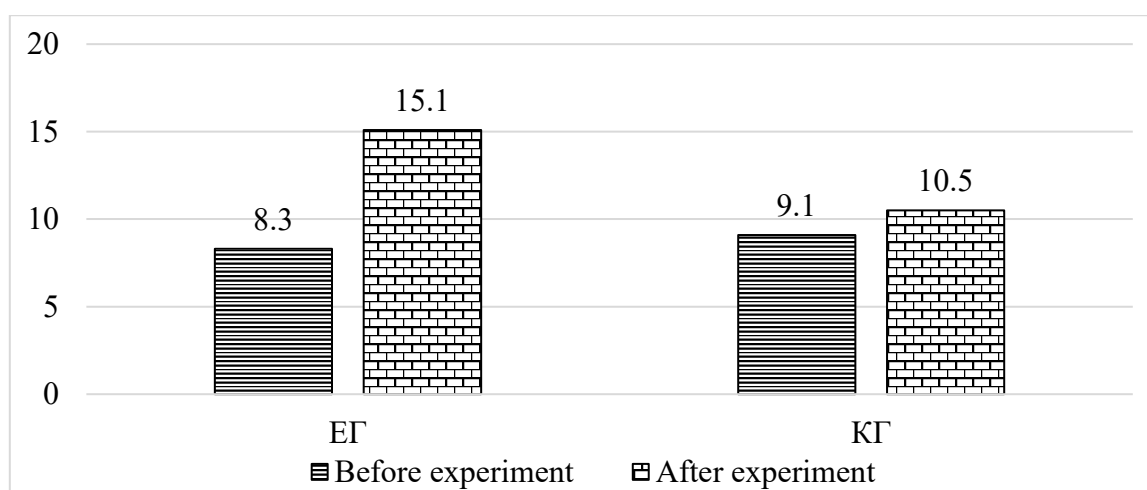


Figure 1 Dynamics of EG and CG children fitness level during the experiment, points (made by authors)

## **Discussion**

Modern physical education is going through intensive transformations aimed at increasing the effectiveness of learning and increasing the motor activity of children. The researchers (Bodnar et al., 2015; Khanikiants et al., 2021; Kukhar, Sorokolit, Yavorsky & Khanikiants, 2021) indicate the importance of modernizing approaches to physical education. One of the key trends is the use of the modern means of physical education in the educational process. Such approaches give possibility to make physical activity more interesting and attractive for children, stimulating their active participation in lessons.

The researchers (Bodnarchuk, Rymar & Solovey, 2018; Sarkauskiene, Noble & Kardeliene, 2019) also indicate the importance of finding modern approaches to the organization of physical education. This includes the development of new methods aimed at attracting various kinds of motor activity, the introduction of the modern sports. The main goal is to create conditions for the development of comprehensive physical activity, which contributes not only to physical health, but also to the development of social skills and self-determination of students.

According to the research (Bodnar, Stefanyshyn & Petryshyn, 2016; Zavydivska et al., 2021), innovations in physical education and motor activity help to make learning more attractive and effective. The introduction of the modern means and methods of teaching becomes a key element of the successful development of physical education nowadays.

As a result of using the Ultimate Frisbee program, the vital index, Robinson index, Ruffier index, strength index, speed and strength index, speed index probably improved in EG children. The dynamics of the parameters of the test exercise "torso tilt" turned out to be positive, but statistically unreliable.

The obtained results prove the positive impact of the developed authors' program. The combination of a large number of special running exercises, various accelerations, movements, jumps in motion and with rotations, with fast stops, various throws and catches during lessons have a positive effect on the activity of the cardiovascular and respiratory systems, increase the level of physical qualities development, in particular endurance, strength, speed, flexibility.

There was a change in EG students from "below average" to "average" level during the experiment, so the positive effect on the children aged 11-12 fitness level was proven.

The developed program allows to solve comprehensively the tasks of physical education of secondary school age students, first of all by strengthening health, ensuring harmonious development, increasing fitness level during favorable periods for physical qualities development.

## Conclusions

The Ultimate Frisbee is one of the modern means of physical education. Practicing Ultimate Frisbee increases fitness level, interest in motor activity, develops physical qualities, improves and expands motor experience. A variety of actions in rapidly changing game conditions help to improve the accuracy of movements, increase the speed of motor reaction, and improve the ability to navigate in space.

The developed Ultimate Frisbee program was aimed at improving the secondary school children fitness level. It consisted of compulsory and optional components and it was divided into two stages. During the lessons, the following tasks were supposed to be solved: studying the rules of the game, learning and improving the technique of the main elements performing (throwing and catching technique, attack and defense tactics), improving fitness level of children aged 11-12. Each lesson had a traditional structure and consisted of preparatory, main and final parts.

It was revealed that during the pedagogical experiment on the implementation of the program with the use of Ultimate Frisbee, a more pronounced nature of positive changes in the parameters of EG children compared to the parameters of CG children was observed.

The analysis of the results of the fitness level parameters showed that the parameters of the vital index improved significantly in EG by 3.28 ml/kg ( $t=2.62$ ;  $p<0.05$ ); Robinson's index by 4.29 points; Ruffier index by 0.08 points; strength index by 3.8 units; the speed-strength index by 0.02 units and speed index by 0.3 units, in the test exercise "Torso tilt" positive, but unreliable changes were revealed. During the experiment, it has been proven a positive effect on children aged 11-12 fitness level, as there was a change in EG children from "below average" to "average" level.

So, the research results listed above have proven the effectiveness of the Ultimate Frisbee program implementation and could be recommended for improving secondary school age children fitness level.

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# ALKOHOLA LIETOŠANA JAUNIEŠU VIDŪ KĀ SOCIĀLI DEFINĒTAS DEVIANATAS UZVEDĪBAS VĒRTĒJUMS SABIEDRĪBĀ

## *Alcohol Use in a Group of Adolescents as Socially Defined Deviant Behavior*

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**Abstract.** *Alcohol consumption among adolescents in social theories is considered a formally defined deviant behavior. There is no doubt about the negative health consequences of this behavior, however, several researchers point to its role in the process of growing up and socialization. Along with the development of theories of deviant behavior, the question – whether alcohol consumption among adolescents is still identified as deviant behavior, becomes relevant. To assess the aspect of alcohol consumption as a socially determined deviance, the results of a longitudinal cohort study among Latvian schoolchildren were analyzed. The analysis of the research data includes such indicators as the characteristics of the situation and age of the adolescent when they try to alcohol first and the attitude of parents towards adolescents alcohol use. The research data were compared in four stages from the start of 7th grade (T1) till the end of 9th grade (T4). The results indicate that adolescents are well informed about the legal ban on alcohol consumption (at the beginning of the study in the T1 period, 89.3% were aware of the ban on the use of alcohol by minors). Still, the contradictory behavior of the parents, allowing adolescents to consume alcohol (in the T4 period, 65.9% of students who have consumed alcohol, their parents have permitted to do so) creates an ambiguous perception of alcohol consumption as a deviant behavior among adolescents. In general, this contradiction can reduce the effectiveness of normative and communicative tools in the prevention of alcohol initiation among adolescents. The results of the study confirm - that to delay the initiation of alcohol consumption among adolescents - it is necessary to define alcohol consumption among adolescents as deviant behavior in society as a whole.*

**Keywords:** *Adolescent, deviant behaviour, parents, social deviance, underage drinking.*

### Ievads

#### *Introduction*

Deviances un deviantas uzvedības jēdzienu definīcija socioloģijas teorētiskajā disciplīnā šobrīd ir attiecināma uz plašu indivīda rīcību loku. Deviantu rīcību kā tādu definē normatīvais regulējums jeb likumdošana, kā arī sabiedrības reakcija jeb sabiedriski noteiktais deviantas uzvedības definējums (Tittle & Paternoster, 2000; Heckert & Heckert, 2002; Smith, 2021). Tomēr

jāņem vērā, ka devianta uzvedība ir situatīvi noteikta. Ne vienmēr devantai uzvedībai, kā normatīvam likuma pārkāpumam, seko arī sabiedriskais nosodījums. Sabiedrības reakcija var būt pretrunīga – no vienas puses paužot nosodījumu, no otras – atsevišķās situācijās deviantu uzvedību attaisnojot vai pat veicinot. Izteikti pretrunīgs ir nepilngadīgo jauniešu alkohola lietošanas kā deviantas uzvedības definējums Latvijas sabiedrībā. Nepilngadīgo jauniešu alkohola lietošana ir normatīvi noteiktas deviantas uzvedības pārkāpums, ko regulē Latvijas likumdošana (LR Saeima, 2004), taču sabiedrības pretrunīgās reakcijas un rīcības saistībā ar alkohola lietošanu nepilngadīgo vidū, mazina pārliecību par šo rīcību kā deviantu kopumā. Viens no aspektiem, kas pētīts gan vairākos ārvalstu pētījumos (Kaynak, Winters, Cacciola, Kirby & Arria, 2014; Levitt & Cooper, 2015; Garcia-Huidobro, Doty, Davis, Borowsky & Allen, 2018; Staff & Maggs, 2019; Kuo, Huang, Wu, & Chen, 2021), gan iekļauts šī pētījuma saturā ir nepilngadīgo jauniešu vecāku rīcība saistībā ar alkohola lietošanu viņu bērnu vidū. No iepriekš veiktajiem pētījumiem var secināt, ka vecāku motivācija atļaut nepilngadīgajiem jauniešiem lietot alkoholu ir saistīta ar vēlmi nodrošināties pret nekontrolētu alkohola lietošanu ārpus vecāku iespējas ietekmēt šo procesu, t.i., alkohola lietošana vienaudžu vidū (Garcia-Huidobro et al., 2018; Kuo et al, 2021), tā var tikt saistīta arī ar cerību, ka šāda rīcība uzlabos vecāku un jauniešu attiecības, tādejādi nodrošinot uzticēšanos turpmāk (Smith & Pollack, 1976, Comasco, Berglund, Orelan & Nilsson, 2010, Staff & Maggs, 2019). Ja aplūkojam šo jautājumu no deviantas uzvedības definējuma viedokļa – vecāku atļauja lietot alkoholu nepilngadīgajiem jeb sabiedriski noteiktā deviantas uzvedības definīcija ir pretrunā ar normatīvo tās regulējumu Latvijā (LR Saeima, 2004).

Lai izvērtētu alkohola lietošanas kā deviantas uzvedības uztveri jauniešu vidū, tika veikta Latvija skolēnu kvantitatīvas aptaujas datu analīze. Šī pētījuma mērķis ir noskaidrot Latvijas skolēnu alkohola lietošanas ieradumus un skolēnu informētību par alkohola lietošanas likumisko aizliegumu, kas vērtējams kā normatīvais šīs deviantas uzvedības definējums, kā arī noskaidrot sabiedriski noteikto deviantas uzvedības definējumu, izvērtējot skolēnu vecāku rīcību dodot atļauju nepilngadīgajiem jauniešiem lietoto alkoholu. Kā arī izpētīt, vai Latvijas jauniešu vidū pastāv pretruna starp nepilngadīgo alkohola lietošanas kā normatīvi noteiktas un kā sabiedriski noteiktas deviantas uzvedības definējumu.

### **Alkohola lietošana nepilngadīgo jauniešu vidū kā deviantas uzvedības forma**

#### ***Alcohol use among adolescent as a form of deviant behavior***

Lai izprastu deviances un deviantas uzvedības jēdzienu saturu nepieciešams izvērtēt vidi, laiku un situāciju, kurā šī rīcība vai indivīda uzvedības pazīmes novērotas un, kas tās novēro jeb definē kā devianci. Kopš 20.gs. beigām

socioloģijas pētniecībā devianta uzvedība tiek definēta plaši – deviantas uzvedības definīciju un skaidrojumus ietekmē izmaiņas sabiedrības struktūrās, uzskatos un situācijās, kurās konkrētā darbība veikta. Devianta uzvedība tiek definēta kā ikviena indivīda doma vai rīcība, kuru nosoda kādas sociālās grupas locekļi vai uztver kā viņu tiesību pārkāpumu. Kopš pagājušā gadsimta beigu pētījumiem socioloģijā, pastāv uzskats, ka funkcionālai deviantas uzvedības definīcijai būtu jāietver divi aspekti – gan objektīvs normu pārkāpums, gan sabiedrības nosodījums (Douglas & Waksler, 1982).

Paplašinot šo deviantas uzvedības definīciju jaunākos pētījumos socioloģijā tika izšķirti trīs gadījumi, kuros uzvedība ir definējama kā devianta:

1. objektīvs normu pārkāpums, kam seko sankcijas;
2. objektīvs normu pārkāpums, kam neseko sankcijas;
3. objektīvs normu pārkāpums nav noticis, bet uzvedība ir bijusi tāda, kurai seko sankcijas – sabiedrības nosodījuma veidā (Tittle & Paternoster, 2000)

Plašais un nenoteiktais deviantas uzvedības formulējums socioloģijā, pētnieku vidū raisījis vairākus jautājumus, piemēram, cik spēcīgai un kādai ir jābūt sabiedrības reakcijai uz uzvedību, lai to definētu kā deviantu (Gibbs, 1981), vai sabiedrības reakcija uz novēroto devianto uzvedību vienmēr būs taisnīga un tās deviantas uzvedības definīcijai var uzticēties, vai uzvedība joprojām ir uzskatāma par deviantu, ja indivīds pārkāpj normas, taču sabiedrības reakcija uz to ir pozitīva vai neitrāla, kā arī, ja sabiedrība indivīda uzvedību neuzskata par deviantu uzvedību, vai tas nozīmē, ka tā tāda nav (Heckert & Heckert, 2002)? Pievēršoties tieši nepilngadīgo jauniešu kā deviantas uzvedības veicēju mērķa grupas rīcības skaidrojumiem socioloģijā, plaši tiek izmantota D. Matza Drifta teorija (angļu val. *Drift theory*). Drifta teorijas pamatā ir risinājumi, kā nepilngadīgie likumpārkāpēji spēj vienlaikus uzturēt gan sabiedrībā pieņemtās, likumiskās, gan deviantai uzvedībai raksturīgās normas un vērtības. Lai pārietu no deviantas uzvedības uz sabiedriski akceptējamu, jaunieši izmanto deviantas uzvedības neitralizācijas tehnikas (angļu val. *techniques of neutralization*), kā rezultātā ir spējīgi īslaicīgi demonstrēt deviantu uzvedību, vienlaikus saglabājot savu vietu sabiedrībā. Kopumā pastāv piecas šādas deviantas uzvedības neitralizācijas tehnikas: vainas novelšana uz citiem, savas rīcības seku nozīmības mazināšana, ja tās rezultātā nav cietušo, vainīgā vainošana, atsaukšanās uz autoritātēm, kas pieprasījušas no jauniešiem šādu rīcību, kā arī savas rīcības skaidrošana ar sekošanu citu piemēram. Pēdējā no minētajām tehnikām norāda uz to, ka jaunieši savu devianto uzvedību skaidro un “neitralizē” situācijās, kad audzinošā persona pati veic šāda veida deviantu uzvedību, šī pētījuma kontekstā – lieto alkoholu vai pārkāpj normatīvo deviantas uzvedības definējumu, atļaujot alkoholu lietot nepilngadīgajiem (Mahorney & Farina, 2014). Drifta teorija kopumā skaidro tikai tās situācijas, kurās jaunieši demonstrē situatīvi deviantu uzvedību, kas nav uzskatāma par hronisku deviantu uzvedību, piemēram, lieto

alkoholu atsevišķos gadījumos. Šis teorētiskais skaidrojums pamato to, ka jauniešu vecāku, kā socializācijas aģentu grupas situatīvi deviantā rīcība – atļaujot lietot alkoholu nepilngadīgajiem - kopumā palīdz jauniešiem skaidrot un “neitralizēt” savu devianto uzvedību.

Svarīgs aspekts ir ne tika, kā jaunieši tiek galā ar deviantas uzvedības sekām, bet arī, motivācijas aspekts, kādēļ jaunieši izlemj veikt deviantu rīcību. Ārpus Latvijas veiktajos pētījumos tika identificēti vairāki iemesli, kas pamudina nepilngadīgos jauniešus lietot alkoholu. Šo iemeslu vidū kopēšana, jeb rīcības atdarināšana, ieņem vienlīdz nozīmīgu lomu, kā socializēšanās un savas dominances vienaudžu grupā izrādīšana (Comasco et al., 2010; Vanherle, Hendriks & Beullens, 2023). No otras puses, svarīgi izprast arī vecāku rīcības, atļaujot vai piedāvājot alkoholu nepilngadīgajiem, motīvus. Vairākos pētījumos tiek norādīts uz to, ka vecāki, dodot atļauju nepilngadīgiem jauniešiem lietot alkoholu it kā cenšas izvairīties no jauniešu pārmērīgas alkohola lietošanas un ar to saistītam problēmām turpmāk, tādejādi cenšoties iemācīt jauniešiem sociāli atbildīgu alkohola lietošanu (Kaynak et al, 2014; Jones & Francis, 2015). Vecāku uzvedības novērošanu un šī uzvedības modeļa pārņemšanu jauniešu atkarību kontekstā tiek skaidrots ar A. Banduras Sociālās iemācīšanās teorijas (no angļu val. *Albert Bandura's Social Learning Theory*) modeli, norādot uz starp personu – vecāku un bērnu sociālo attiecību nozīmību vērtību un uzvedības apgūvē pusaudžu vecumā. Tieši pārņemot šī modeļa principu, var secināt, ka jaunieši, kuri novēro vecāku alkohola lietošanu, pārņems vecāku rīcību kā “normu” (Smith, 2021).

Citos veiktajos pētījumos secināts, ka vecāku rīcība, ļaujot nepilngadīgajiem bērniem lietoto alkoholu, nav nedz aizsargājoša, nedz pastiprinātu alkohola lietošanu veicinoša. Tās sekas var būt atšķirīgas, ņemot vērā katras ģimenes individuālo situāciju (Levitt & Cooper, 2015).

Lai izvērtētu alkohola lietošanas nepilngadīgo jauniešu vidū kā deviantas uzvedības normatīvās un sabiedriski noteiktās definīcijas pretrunas Latvijas sabiedrībā, tika analizēti dati no Latvijā veikta skolēnu kvantitatīva garengriezuma kohortas tipa pētījuma.

### **Pētījuma rezultāti** ***Research results***

Pētījuma datu analīzē tika izmantota daļa no Latvijas skolēnu kvantitatīvās aptaujas, kas veikta kā garengriezuma kohortas tipa pētījums ar nejaušinātu kohortas izlasi (Mārtinsone, Pipere & Kamerāde, 2017). Pētījuma mērķis ir gūt padziļinātu ieskatu Latvijas 7.–9. klases skolēnu attieksmē un alkohola patēriņu veidojošajos faktoros. Kopumā šī garengriezuma pētījuma laikā periodā no 2015.gada līdz 2018. gadam tika veiktas četras secīgas kvantitatīvas skolēnu aptaujas, sākot ar periodu, kad jaunieši uzsāka mācības 7. klasē, un beidzot ar

9. klases otro semestri. Pētījuma izlase reprezentē visas Latvijas vispārizglītojošās skolas pēc sekojošiem parametriem: izglītības iestādes atrašanās vieta (novads, apdzīvotas vietas veids un novada iedzīvotāju skaits) un lielums. Dalību pirmajā pētījuma ciklā (T1) uzsāka 1754 skolēni, taču pētījuma laikā bija atsevišķas izglītības iestādes vai to klases, kuras no tālākas dalības pētījumā atteicās, līdz ar to pētījumu pabeidza (T4) kopumā 1166 skolēni.

Visas pētījumā iekļautās kvantitatīvās aptaujas bija anonīmas, un skolēni tās aizpildīja interneta vidē. Skolēniem bija iespēja patstāvīgi aizpildīt pētījuma anketas. Lai novērstu savstarpējo komunikāciju respondentu vidū, aptaujas laikā telpā, kurā notika aptaujas aizpildīšana, kopā ar skolēniem atradās pētnieks – novērotājs. Vienas klases jaunieši anketas aizpildīja vienlaicīgi. Pētījuma realizācijā tika adaptēts instrumentārijs no 2013.gadā Lielbritānijā publicētā pētījuma, kura mērķis bija izvērtēt Lielbritānijas skolās ieviestās alkohola lietošanas prevencijas programmas (Lynch, Styles, Dawson, Worth, Kerr, & Lloyd, 2013), kas papildināts ar Latvijas situācijai atbilstošiem indikatoriem, kas norāda uz skolēnu informētību un alkohola lietošanu.

Pētījuma datu analīzei tika izmantoti dati, kas atspoguļo Latvijas skolēnu informētību par alkohola lietošanas aizliegumu nepilngadīgajām personām, skolēnu personisko pieredzi alkohola lietošanā un saņemto vecāku atļauju lietot alkoholu. Dati tika analizēti dinamikā, salīdzinot iegūtos rezultātus visos četros pētījuma posmos.

Latvijas skolēnu kvantitatīvās aptaujas datu analīzē tika iekļauti sekojoši parametri:

- Skolēnu alkohola lietošanas paradumi, kas ietver: jaunieša vecumu un alkohola lietošanas pieredzi kopumā periodā no 7. klases sākuma līdz 9. klases beigām,
- Skolēnu informētība par alkohola lietošanas aizliegumu nepilngadīgām personām un tās izmaiņas katrā no pētījuma posmiem,
- Skolēnu vecāku rīcība saistībā ar alkohola piedāvāšanu bērniem, katrā no pētījuma posmiem.

Izvērtējot pētījuma datus, var secināt, ka jau uzsākot pētījuma pirmo posmu (T1), kurā skolēni uzsāka mācības 7. klasē (vidējais vecums 12,88 gadi) vairāk kā puse aptaujāto skolēnu jeb 61,55% bija iepriekš lietojuši alkoholu vienu (43,07%) vai vairākas (18,48%) reizes. Vērtējot pētījuma datus dinamikā visos pētījuma posmos, sākot no T3 perioda (8. klases noslēguma, kad skolēnu vidējais vecums bija 14,44 gadus veci), izlasē vairāk ir tādu skolēnu, kuri alkoholu lietojuši atkārtoti 39,17%, salīdzinot ar to skolēnu īpatsvaru pētījuma periodā, kuri alkoholu tikai pamēģinājuši jeb lietojuši vienu reizi (36,64%). Kopumā, 8. klases noslēgumā vairāk kā 75% aptaujāto skolēnu ir lietojuši alkoholu, bet 9. klases noslēgumā jau vairāk kā 80% no aptaujājajiem skolēniem ir lietojuši alkoholu, vairāk kā puse (54,03%) to ir darījusi atkārtoti. Kopējo alkohola lietošanas skolēnu vidū statistiku visos četros pētījuma posmos skat. 1.tabulā.

1. tabula. **Jauniešu vecums un alkohola lietošanas ieradumi** (autores veidota)  
Table 1 **Adolescent age and drinking habits** (made by author)

Pētījuma periods	Skolēnu vidējais vecums (gados)	Skolēnu alkohola lietošanas ieradumi		
		% no skolēnu izlases, kuri ir pamēģinājuši alkoholu*	% no skolēnu izlases, kuri ir lietojuši alkoholu atkārtoti	% no skolēnu izlases, kuri ir lietojuši alkoholu**
T1	12.88	43.07%	18.48%	61.55%
T2	13.49	41.36%	28.00%	69.36%
T3	14.44	36.64%	39.17%	75.81%
T4	15.31	27.87%	54.03%	81.90%

Avots: Garengriezuma kohortas tipa pētījums Latvijas skolēnu vidū.

\*Alkohols lietots vienu reizi

\*\*Alkohols lietots vismaz vienu reizi dzīves laikā

Bāze: n=1753 T1, n=1661 T2, n=1381 T3, n=1166 T4.

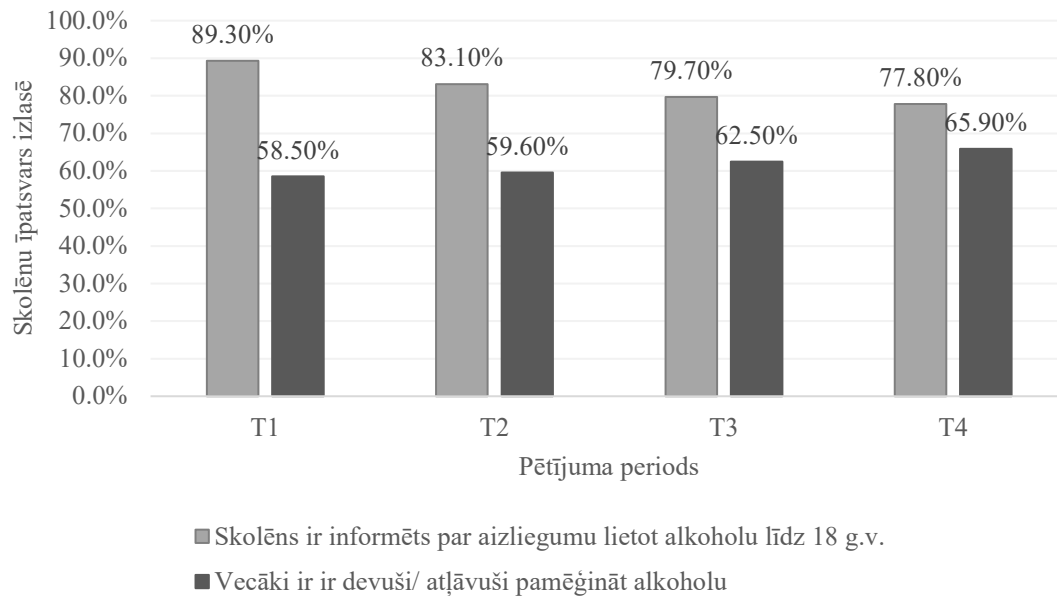
Uzsākot pētījumu (T1 periodā) 89,30% skolēnu zināja, bija informēti par to, ka lietot alkoholu personām, kas jaunākas par 18 gadiem, ir aizliegts. Ar katru nākamo pētījuma periodu to skolēnu proporcija, kuri atbild, ka ir informēti par šo aizliegumu, mazinās. 9. klases beigās (T3), par aizliegumu informēti ir 77,8% izlases skolēnu. Turpretī ar katru aptaujas periodu pieaug alkohola lietojušo skolēnu skaits (skat. tabulā nr.1), kā arī ar katru nākamo pētījuma posmu pieaug to skolēnu vecāku proporcija, kuri ir devuši/ atļāvuši skolēniem lietot alkoholu (skat. attēlā nr.1). Uzsākot pētījumu (T1) vairāk kā pusei (58,5%) no tiem jauniešiem, kuri ir lietojuši alkoholu, vecāki ir devuši alkoholu vai atļāvuši to lietot. Pēdējā pētījuma posmā (T3) jau 65,9% no skolēniem, kuri ir lietojuši alkoholu, to ir darījuši ar vecāku atļauju. Kopējo skolēnu īpatsvaru, kuri ir informēti par aizliegumu lietoto alkoholu personām, kuras ir jaunākas par 18 gadiem, kā arī to skolēnu proporciju, kuri alkoholu ir lietojuši ar vecāku atļauju skat. 1.attēlā.

Iepriekš veiktā Latvijas skolēnu aptaujas rezultātu analīze iezīmē vairākas būtiskas tendences, kas raksturo skolēnu informētību par alkohola lietošanas normatīvo aizliegumu un vecāku rīcību atļaujot alkohola lietošanu saviem nepilngadīgajiem bērniem. Šīs kopsakarības ir:

1. Jo lielāks īpatsvars skolēnu izlasē ir lietojuši alkoholu, jo mazāka ir skolēnu pārliecība par alkohola lietošanas aizliegumu, kas nosaka šī procesa kā normatīvi noteiktas devianatas uzvedības patiesumu.
2. Vairāk kā puse Latvijas skolēnu vecāku (58,50% T1 un 65,90% T4) demonstrē nepilngadīgo jauniešu alkohola lietošanas kā sociāli noteiktas devianatas uzvedības noliegumu, dodot atļauju lietot vai piedāvājot alkoholu nepilngadīgajiem.



3. Jo lielākai proporcijai no aptaujātajiem skolēniem pētījuma posma izlasē vecāki ir devuši atļauju lietot alkoholu vai piedāvājuši alkoholu, jo mazāka ir to skolēnu proporcija, kas ir pārliecināti, ka nepilngadīgām personām lietoto alkoholu ir aizliegts.



*1.attēls. Skolēnu informētība par alkohola lietošanas aizliegumu un vecāku rīcība, piedāvājot alkoholu bērniem (autores veidots)*

*Figure 1 Adolescents' awareness of the legal ban on alcohol consumption and parents' behavior offering alcohol (made by author)*

No pētījuma rezultātos novērotajām kopsakarībām var secināt, ka nepilngadīgo alkohola lietošanas kā normatīvi regulētas deviantas uzvedības definējums skolēnu vidū zaudē nozīmību, ja nepilngadīgais jauniešis pats ir lietojis alkoholu un, ja jaunieša vecāki ir devuši atļauju vai piedāvājuši nepilngadīgajam jauniešim lietot alkoholu. Šādu vecāku rīcību, kas ir pretrunā ar normatīvo regulējumu, jaunieši potenciāli var izmantot gan kā savas deviantās uzvedības “neitralizācijas” tehniku (Mahorney & Faina, 2014), gan tā kopumā mazina alkohola lietošanas nepilngadīgajiem aizlieguma kā normatīvās deviantās uzvedības definējuma nozīmību skolēnu vidū. Šajā gadījumā, lai gan jaunieši demonstrē deviantu uzvedību, pārkāpjot normatīvo regulējumu, šādai rīcībai neseko skaidrs nosodījums no sabiedrības, t.i., vecāku puses.

Lai gan pētījuma datu apjoms un periods, kurā veikta garengriezuma kohortas tipa aptaujas ir pietiekams, lai detalizēti izvērtētu 7. līdz 9. klašu skolēnu mērķa grupas ieradumus saistībā ar alkohola lietošanu, tomēr datu analizē pastāv ierobežojumi. Pētījuma datu struktūra ir aprakstoša un pietrūkst iespējas analizēt aspektu savstarpējo ietekmi. Datu analizē noskaidrots, ka pastāv sakarība, tomēr nav iespējas detalizēti izvērtēt, kurš apstāklis ir noteicošais, kas pamudina pārējo

aspektu izmaiņas. Turpmākai datu ieguvei ieteicams pievērst uzmanību apstākļu hronoloģiskam secīgumam un to savstarpējās ietekmes izvērtējamam.

## **Summary**

Alcohol consumption by adolescents in Latvia is generally normatively defined as deviant behaviour or violation of the legislation. However, considering the prevalence of such behaviour in Latvia – 89% of Latvian adolescents have consumed alcohol (SPKC, 2019), the question arises whether the normative definition of alcohol consumption as deviant behaviour corresponds to the definition of this behaviour by society as deviant behaviour. More recent definitions of deviant behaviour in sociology make it possible to define behaviour as deviant if it is condemned by society and normatively, but there are also several intermediate conditions when deviant behaviour is defined differently from a normative and societal point of view. Alcohol consumption among youth is one form of this controversially evaluated deviant behaviour. D. Matza's drift theory explains how minors who violate the normative regulation are nevertheless able to keep their role in the legal society. Sociology researchers have concluded that deviant behaviour can be determined situationally and depends on whether action is followed by condemnation by society. The study aimed to understand whether the normative definition of alcohol consumption as deviant behaviour in the perception of youth in Latvia is equally understood as a condemnation of alcohol consumption by society. Data from a longitudinal cohort-type survey among youth from Latvian schools was analysed to study this aspect of the perception of deviant behaviour. Correlations between the drinking habits of youth, the awareness of school youth about the normative regulation of alcohol consumption by minors and the behaviour of parents of youth in allowing alcohol consumption by minors are sought in the analysis of the data. The data were analysed in the dynamics of the four phases of the study. The study results show that the higher the share of adolescents in the sample who consumed alcohol once or more times, the lower the adolescents' confidence that the alcohol consumption prohibition is true, which determines the behaviour of this process as a formally determined deviant behaviour. More than half of parents of adolescents demonstrate a denial of alcohol consumption by youth as socially defined deviant behaviour by permitting minors to consume alcohol or by offering alcohol to minors. The higher the share of adolescents surveyed in the study phase sample, whose parents have given permission to consume or offered alcohol, the lower the share of adolescents convinced that alcohol consumption by minors is prohibited. As a result, the data of the study confirm that the normatively determined regulation of deviant behaviour is not effective in Latvia, and the lack of a unified condemnation of socially determined deviant behaviour is one of the aspects reducing its effectiveness.

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## UKRAINIAN IN EDUCATION OF STUDENTS FROM UKRAINE: MODERN FEATURES

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**Abstract.** *The purpose of the research is to find out the modern features of studying the Ukrainian language by students from Ukraine and to propose ways and means to improve the effectiveness of this process.*

*The following research methods were used: theoretical analysis of scientific literature on the issue; processing, analysis and comparison of statistical data; survey of headmasters of general secondary education institutions and students; classification and generalization of the survey results; graphic methods.*

*The dynamics of changes in the number of students from Ukraine who are studying (were studying) in the Ukrainian language and the number of relevant educational institutions in Ukraine were monitored. Particular attention is paid to the features of studying Ukrainian by students who, because of the war, are living abroad now. The article analyzes the features of studying the Ukrainian language as a state language, and the identified cases of changing the language of studying. The current study investigates the discrepancies between the teachers' assessment of the students' level of the Ukrainian language proficiency and the students' self-assessment. The authors propose the ways and means for improving the effectiveness of studying the Ukrainian language and raising the level of students' mastery of the state language are proposed.*

**Keywords:** *features of studying the Ukrainian language, studying at school in Ukrainian, studying the Ukrainian language, teaching in Ukrainian, the Ukrainian language.*

### Introduction

The research of the functioning of the Ukrainian language in the field of school education is important for the preservation of the self-identity of Ukrainians, the stability and prosperity of Ukraine, because a language has the main unifying role, “a national language is one of the most important factors for the consolidation of a population within a country” (Masenko, 2004, p. 102). In Ukrainian general secondary education institutions (Ukrainian schools), Ukrainian is studied as a subject. According to the current legislation, the Ukrainian language is the only state language in Ukraine. For most students,

Ukrainian is their native language. At the same time, Ukraine is characterized by the residence of school-age children of different nationalities, which affects the mastery of the Ukrainian language. Due to the Russian aggression, there was (and there is) a movement of Ukrainian students across the territory of Ukraine or abroad, which also had an effect on the study of the Ukrainian language. Studying it in the mentioned conditions requires the identification of features, their detailed consideration and the synthesis of relevant conclusions.

*The purpose of the article* is to find out the modern features of studying the Ukrainian language by students from Ukraine, to propose ways and means to improve the efficiency of the relevant process.

### **Research methodology**

For a thorough study of the problem, an analysis of literature on the research problem was carried out in order to clarify the state of use of the Ukrainian language, the historical specificity of the corresponding language situation. The statistical data of the Ministry of Education and Science of Ukraine were analyzed, the results of the study on ensuring the functioning of the state language in the educational process in general secondary education institutions and collected by the State Service of Education Quality of Ukraine through the survey that covered 3726 teachers, 16000 students, and 10558 parents (The State Education Quality Service of Ukraine, 2023).

To achieve the goal of the research, the questionnaires for each of two groups of respondents were developed: for headmasters of Ukrainian schools and students of grades 5-11. The questionnaires were developed with the help of Google forms, the links to which were sent to all education departments of Ukraine by the letter from the Institute of Pedagogy of the National Academy of Pedagogical Sciences of Ukraine with the aim of further distribution to all Ukrainian schools. Teachers and parents also helped organize the student survey.

The survey, which took place from September to October 2023, involved:

- 1) 1067 headmasters of the Ukrainian schools from Cherkasy, Khmelnytskyi, Kyiv, Mykolaiv, and Volyn regions,
- 2) 14620 students of grades 5-11 from Cherkasy, Chernihiv, Chernivtsi, Dnipropetrovsk, Donetsk, Kherson, Khmelnytsky, Kirovohrad, Kyiv, Luhansk, Lviv, Mykolaiv, Odesa, Rivne, Sumy, Ternopil, Zakarpattia regions.

The results of the survey indicate that 96% of the respondents of the second group live in Ukraine, the rest live abroad.

The distribution of students by forms is presented on fig. 1.

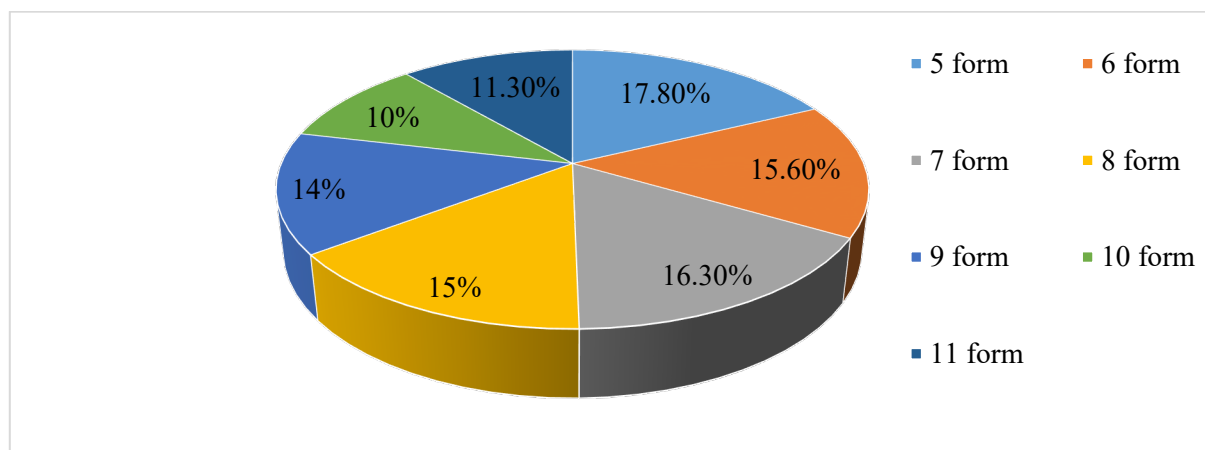


Figure 1 *Interviewed students by forms (made by Authors)*

### Literature review

At the first stage of the research, an analysis of scientific and methodical sources on the relevant topic was carried out. In the analyzed sources (Makarets, 2019; Danylevska, 2019b; NAN Ukrainy, 2008) the thesis that Ukraine is a multinational state can be traced. therefore, when regulating the language regime in order to achieve linguistic balance, it is necessary to take into account national interests and strive to satisfy the linguistic needs of representatives of various ethnic groups. Thus, Y. Makarets (2019) emphasizes: “Ensuring the linguistic interests of society is one of the key issues of the national security of the state”. The author writes about the unique linguistic situation in Ukraine: a powerful policy of russification imposed on the population in Ukraine since the existence of the russian empire and the Soviet Union, as well as about Ukraine’s current presence in the sphere of russia’s political interests, and, at the same time, about Ukraine’s desire to adhere to standards of the Council of Europe through Ukraine’s aspirations to become a member of the European Union.

According to Maria Boiko, “Ukrainian identity is inextricably linked to the status of the mother tongue, the attitude of citizens towards it” (Boiko, 2020). In her publication, M. Boiko examines the language situation in secondary and higher education institutions of Eastern Ukraine, in particular the functioning of the Ukrainian language in the situation of Ukrainian-Russian bilingualism, the state of use of the Ukrainian language in the educational area, reveals the main reasons that encourage young people to use the Ukrainian language. The functioning of the Ukrainian language in the educational area of Donetsk region at the beginning of the 21th century is described more thoroughly and in detail in the Maria Boiko’s dissertation for the Doctor of Philosophy degree “Functioning of the Ukrainian language in the educational area of Donetsk region at the beginning of the 21th century” (Boiko, 2023). In the mentioned works, M. Boiko describes the dynamics of language use in the educational area and defines

strategies and tactics for increasing the communicative power of the Ukrainian language among young people.

The features of the language situation in Ukraine are described in a number of publications. In particular, S. Yaremenko examines it in the historical context (Yaremenko, 2002), emphasizing development and normalization of the Ukrainian literary language, the struggle for its social status in the late XIX - early XX centuries. Svitlana Sokolova and Oksana Danylevska traced the dynamics of the use of the Ukrainian language and the attitude of the population to language policy measures in the school education system during 2008-2018 (Sokolova & Danylevska, 2018). O. Danylevska writes about the heterogeneity of the language area in educational institutions, the unevenness of the language situation by region, by type of settlement (Danylevska, 2019b). In addition, Oksana Danylevska analyzes the attitude of speakers of different age groups toward the language situation in school education in Ukraine (Danylevska, 2019a). Lesia Kovach analyzed the language situation and state language policy in Ukraine in the historical context and emphasises that “a nation can only be fully functional when its basic functional sphere - language - performs all its functions” (Kovach, 2010). The book “Language and Politics” (Masenko, 2004) talks about the negative consequences of prolonged russification and the obligation to use the Ukrainian language “in controlled spheres with the practice of protecting the Ukrainian language”. Larisa Masenko highlights the research of the state and functioning of the Ukrainian language in a bilingual society (Masenko, 2004).

The use of the Ukrainian language by Ukrainians living abroad (in Poland) is described by the Polish scientist Pavlo Levchuk (Levchuk, 2015, 2020). In particular, it is about Ukrainian-Polish-Russian trilingualism.

The facts of the genocide of the Ukrainian language are taking place in the temporarily occupied territories. The problem of linguicide is considered in detail by Amir Salimi (Salimi, 2019), who singles out the following method of language destruction as linguistic genocide, denial of the fact that a language is a language itself (for example, that it is only a dialect). A. Salimi writes about the imposition of monolingual education. In Ukraine, such an imposition of teaching in the Russian language takes place in the temporarily occupied territories. Alex Hanton (Hanton, 2010) emphasizes that “linguistic genocide has frequently been used throughout history to systematically eradicate languages, for one reason or another”. The examples of linguistic genocide are:

- repression of the Korean language from 1910 to 1945 during the occupation of Korea by Japan (then in Korea, Japanese was the language of teaching in schools; Korean was first studied by students as an optional course, and later it was completely banned);
- discrimination against Basque, Catalan and Galician languages during Franco’s rule from 1939 to 1975 in Spain;



- forced russification as the leading idea of the language policy of imperial Russia and the Soviet Union, which negatively affected a significant number of languages.

At the same time, as a result of the analysis of the literature (Pearce, 2022), a rapid increase in interest in learning the Ukrainian language was revealed after Russia began military aggression against Ukraine. This is confirmed by the facts published on March 30, 2022 in the online edition of the Los Angeles Times, cited by Matt Pearce (2022):

- from the end of February 2022 to March 20, 2022, the total number of users learning Ukrainian using the Duolingo language application increased by 577%; the number of users learning Ukrainian using Duolingo in Poland increased by 2677% (Pearce, 2022);
- the number of users learning Ukrainian using the Mondly language learning platform increased by 900% (Pearce, 2022).

### **Research results**

The use of the Ukrainian language as a means of studying the content of educational subjects is a significant positive factor for increasing the level of language proficiency. Comparing modern and pre-war statistics, it was found that at the beginning of the 2021/2022 academic year, 13047 Ukrainian schools where teaching was in Ukrainian operated in Ukraine (IEA, 2022). This is a little more than 95% of the total number of Ukrainian schools. In the 2023/2024 academic year, there are 12155 Ukrainian schools where teaching is in the Ukrainian language (IEA, 2024). This is a little more than 98% of the total number of Ukrainian schools. That is, the share of Ukrainian schools with teaching in Ukrainian increased by 3%.

Comparing the percentage of students studying in Ukrainian, the following was found:

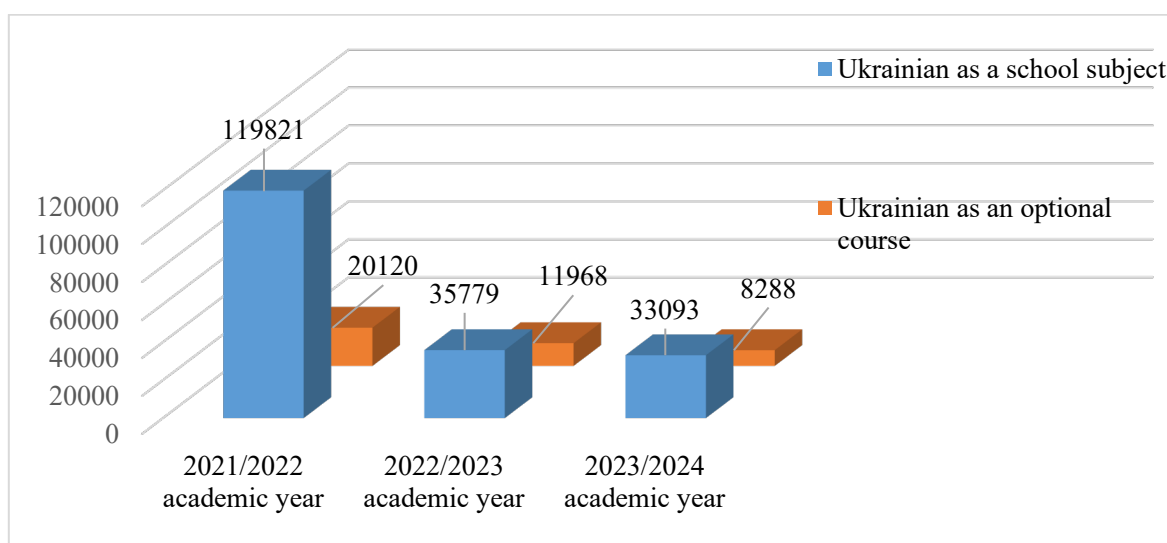
- at the beginning of the 2022/2023 academic year, they accounted for 92.8% of the total number of students;
- in the 2023/2024 academic year, such students are 98.8% of the total number of students.

The study found out whether there were cases of students changing their language of studying to Ukrainian – 6% of the headmasters stated the fact that their students changed the language of studying from Russian to Ukrainian. When the headmasters were asked if they had any difficulties due to the change, 98% of them answered: “No”.

Ukraine is a multinational state in which more than 100 nationalities and ethnic groups live. This affects the language policy, which is implemented in accordance with international obligations, the Constitution of Ukraine and relevant legislative acts. The specified situation determines the expediency of

considering the features of mastering the Ukrainian language by students who are representatives of national minorities and indigenous people. In Ukraine, students study Ukrainian as their mother tongue or as the state language. The educational process in Ukrainian schools is carried out in the state language. The introduction of changes in the legislation of Ukraine in 2019 (Verhovna Rada Ukrainy, 2019) allowed to use the native language (except the language of the aggressor state) together with the state language in classes (groups) with teaching in the languages of national minorities, which are the official languages of the European Union, and in the education of students belonging to the indigenous peoples of Ukraine. Pupils who are representatives of other national minorities of Ukraine acquire basic and specialized secondary education in the Ukrainian language in the amount of at least 80% of the annual amount of study time. Students study Ukrainian as the state language in Ukraine in accordance with specially developed educational programs and textbooks.

A comparison of official statistical data showed that the number of students studying Ukrainian as a state language (as a second language) has decreased in recent years (fig. 2).



**Figure 2** *The number of students studying the Ukrainian language as a school subject and as part of selective courses (optional courses or clubs) in 2021-2024 (compiled by authors, based on IEA, 2022, 2023, 2024).*

Among the surveyed respondents there were 4% of students who live abroad. These students, as a rule, study in school abroad and in Ukrainian school under one of the forms of education provided for by Ukrainian legislation (distance, family, external). Before the beginning of the 2023/2024 academic year, certain normative documents of the Ministry of Education and Science of Ukraine were adopted (MON, 2023a; MON, 2023b), which makes it possible to simplify the education of Ukrainian children who are now forced to live abroad and study in

Ukrainian schools, by reducing the workload (studying only subjects of the Ukrainian studies component). The educational process for such students is organized in accordance with a specially developed Model educational program (MON, 2023c).

At the same time, it should be taken into account that students living abroad study offline in the language of the country they moved to due to the war, and in Ukrainian in Ukrainian schools, which makes studying the Ukrainian language bilingual and causes additional difficulties. That is, Ukrainian children abroad find themselves in an unfamiliar linguistic environment and are forced to study the language of the country in which they received shelter and assistance, which is unfamiliar. As Larisa Masenko notes, “the presence of an environment of monolinguals who would not be influenced by a second language is a necessary prerequisite for language preservation in a situation of mass bilingualism” (Masenko, 2004). This is an extremely important condition, if not mandatory one.

The surveyed students are taught abroad in different languages (fig. 3).

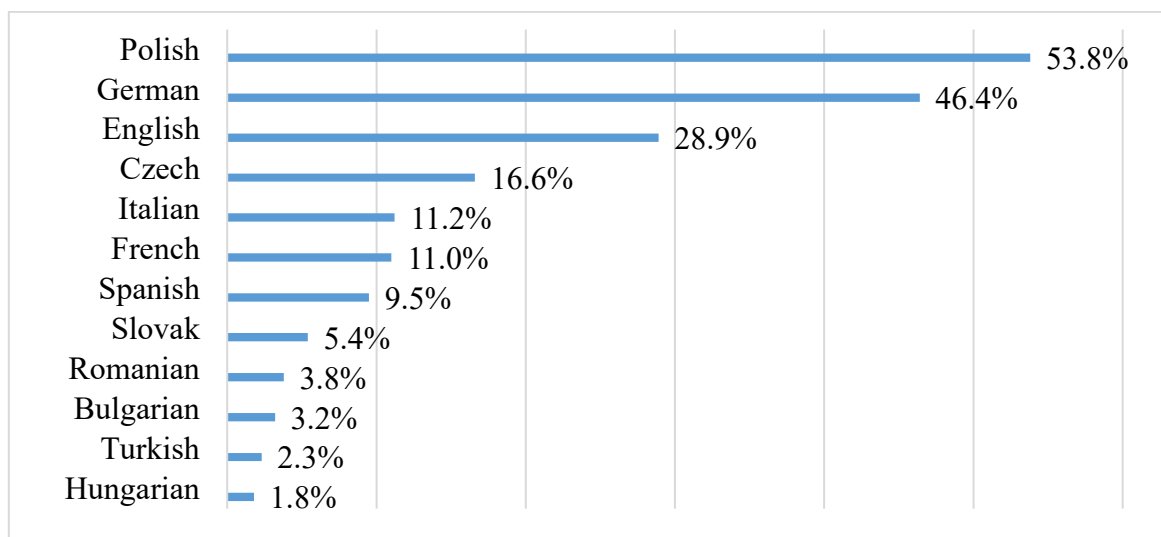


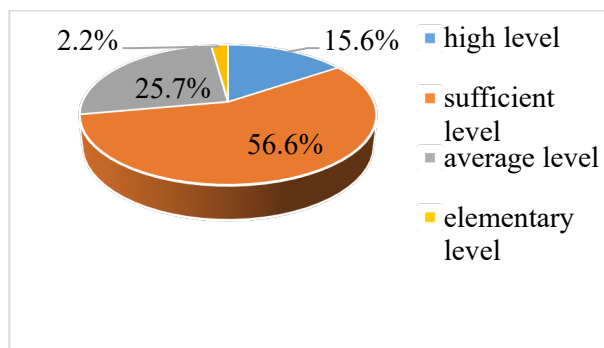
Figure 3 *Languages of studying of the surveyed students (made by authors)*

A small part of the respondents is taught in such languages as Finnish, Norwegian, Dutch, Swedish, Russian, Korean, Albanian, Estonian, Lithuanian and Danish. The number of students taught in each of these languages is less than 1% of the total number.

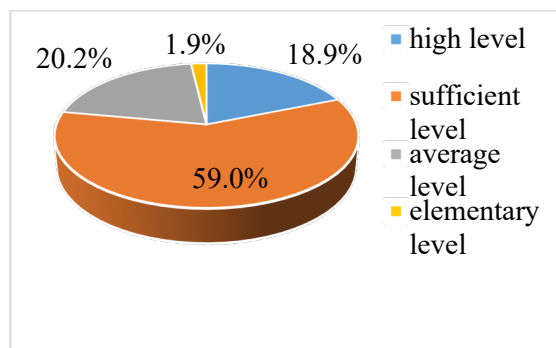
Recently, there has been an increase in the level of students' proficiency in the Ukrainian language. This is confirmed by a study conducted by the State Service of Education Quality of Ukraine to study the state of use of the state language in the educational process in Ukrainian schools (Hurak, 2023).

The results obtained during the survey indicate that more than half of the surveyed students know the Ukrainian language at a sufficient level. Students were asked to assess their level of Ukrainian language proficiency. Due to a

possible error in the process of students' self-assessment, they were also asked to indicate how their level of the Ukrainian language is assessed by their Ukrainian teachers. The difference between these assessments is 3,6% (fig. 4, fig. 5).



**Figure 4 The students' level of Ukrainian language proficiency according to the teachers' assessment**  
(made by authors)



**Figure 5 The students' level of Ukrainian language proficiency according to the students' self-assessment**  
(made by authors)

The identified features of students studying Ukrainian make it necessary to find ways and means to improve the effectiveness of the language study. The useful and important things are the work of speaking clubs for children and their family members in Ukraine and abroad, replenishment of library funds, creation of digital educational resources, educational platforms, quality content in the Ukrainian language (creation of fiction, documentaries and cartoons, publishing of books, etc.).

The authors argue that students' systematic work with texts will contribute to effective studying of the Ukrainian language. As a result of the students' questionnaire, their preferences regarding the stylistic specificity of the texts were identified: 55,6% of the surveyed students chose fiction; 44,4% – scientific and cognitive texts. Such results prove the expediency of using in the educational process texts that differ in style, genre, and volume. At the same time, it is important to provide students with the opportunity to choose texts. To ensure effective studying of the Ukrainian language, it is advisable to differentiate tasks for working with texts by degree of complexity.

Students were asked about the types of work with texts they prefer. The results show that 44,5% want to work with texts individually; 55,5% would choose joint work (32,3% of them – work in pairs, 23,2% – in groups). This determines the expediency of using different types and forms of working with texts to increase the effectiveness of studying the Ukrainian language.

## **Conclusions**

Both positive and negative aspects are characteristic of teaching in the Ukrainian language and studying Ukrainian. Russia's full-scale invasion also had a significant impact on the language situation in Ukraine. The share of students studying in the Ukrainian language has increased (while the total number of students studying in Ukrainian schools has decreased). The study demonstrates that some of the students who studied in Russian are now studying in Ukrainian. This happened because some Ukrainian schools with teaching in the Russian language were located in the territories most affected by the war. Part of the schools were in the temporarily occupied territory, some of them were destroyed or damaged, so the students were forced to change their place of residence and school. At the same time, Russia's attack caused the growth of patriotic sentiments among children, teenagers, and adults who used to communicate in Russian, and the emergence of a desire to communicate in Ukrainian.

Some students went abroad and not all of them study online in a Ukrainian school. Children from Ukraine, who live abroad and speak Ukrainian with family members, find themselves outside the home in a foreign-language environment and are forced to switch to another language of communication.

Today, society needs a clear understanding of the need to support the Ukrainian language at the state level, because "a common language is one of the main factors that ensure the solidarity of the population and, accordingly, the stability of the state" (Masenko, 2004, p. 8). Therefore, it is advisable to improve language legislation in Ukraine, develop strategies and tactics for the widest possible use of the state language, mechanisms to strengthen its communicative power in society.

To improve the effectiveness of studying and using the Ukrainian language in school education, it is necessary to carry out systematic diagnostics and appropriate correction, optimization of the language environment and increase of methods and means of studying the Ukrainian language.

The prospect of further research is in the study of the problem of forming students' positive motivation to study the Ukrainian language, improving the mechanism for monitoring students' academic achievements in the Ukrainian language.

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## PHYSICAL EDUCATION OF UKRAINIAN SCHOOLCHILDREN DURING DISTANCE LEARNING

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**Abstract.** *The article addresses the challenges associated with fostering the physical development of Ukrainian schoolchildren connected with distance learning in physical education. The primary conditions for adopting distance learning stemmed from the Covid-19 pandemic and now confronts military aggression from Russia. The goal: to track the progress of 7th-grade students' physical development through remote physical education learning programme. Research methods: theoretical analysis, literature review, pupil questionnaire, pedagogical experiments, and statistical analysis. Surveying 126 7th-grade pupils (60 boys and 66 girls) revealed a prevailing preference for traditional face-to-face physical education classes. Only 11.11% of pupils considered distance learning to replicate a well-structured physical education session. Results showed that 84.12% believed remote lessons influenced their motor activity, physical fitness, and interest in exercises, 57.15% reported decreased personal motor activity, 42.85% felt their physical fitness remained unchanged. The methods employed by teachers during distance learning included fitness programmes (58.73%), general developmental exercises (42.86%), and strength exercises (36.51%). Approximately 22.22% of pupils indicated a tendency to disengage from distance lessons. The authors' remote physical education learning programme proved effective fitness indicators among the experimental group (EG) pupils compared to the control group (CG). Statistically significant differences were established across multiple physical fitness indicators for 7th-grade EG schoolchildren.*

**Keywords:** *distance learning, physical education, 7<sup>th</sup> grade schoolchildren.*



## **Introduction**

For the last four years physical education in Ukrainian schools has been in rather difficult circumstances. At first, the prerequisite was the Covid-19 pandemic (introduction of strict and adaptive quarantine), and now this is the unprovoked full-scale invasion of Ukraine by Russia, which prompted Ministry of Health of Ukraine and Ministry of Education and Science of Ukraine to switch to distance learning. The problem of conducting physical education lessons for sports that require special equipment and inventory, as well as team interaction, has arisen, which negatively affects not only the dynamics of the development of physical qualities, but also technical and tactical training of schoolchildren in each sport. Teachers and students have faced a number of difficulties with the preparation of video materials, the impossibility of conducting online physical education lessons in home setting, the impossibility of mastering technical training exercises in many sports that are included in the curriculum, low level of proficiency and provision of modern information and communication technologies both among physical education teachers and students.

## **Literature review**

A significant number of Ukrainian scientists have devoted their articles to the issue of selection of means for remote physical education lessons. Scientists emphasize the difficulties of physical education during the period of quarantine and distance learning (Kryviencova, Klimenchenko, & Ivanov, 2020; Bashtenko & Stanieva, 2021; Ilnitska, Semashko, & Kryviencova, 2021; Sapiiegina, 2022); peculiarities of physical education of schoolchildren and the necessity to select innovative forms for distance learning period (Poproshaiev, Muntjan, & Goienko, 2020; Cherepovska, 2021; Cybulko & Globa, 2021; Mozoliev, 2022), as well as the study of pupils' motivation to engage in physical exercises (Kukhar, Sorokolit, Yavorsky, Rymar, & Khanikiants, 2021); the effect of distance learning on pupils' motor activity (Sirovatko & Yefremenko, 2022); issues regarding adaptation of pupils and parents to remote physical education lessons (Maslova et al., 2021), their interaction in the conditions of distance and mixed learning: two-years' experience of overcoming the negative impact of the COVID-19 pandemic (Malykhin, Aristova, & Kalinina, 2022); peculiarities of physical education of schoolchildren in the conditions of martial law (Lytvyn, 2022; Zabijako, 2023); the effect of distance learning on motor activity of schoolchildren in the conditions of martial law (Vashchuk, 2022); application of an integrated approach in modern school in the context of distance learning (Horbatiuk, Polishchuk, Kuchynska, & Blashkova, 2023).

In addition, research related to the introduction of reforms in Ukrainian school education has intensified in recent years (Moskalenko, Bodnar, Sorokolit, Rymar, & Solovey, 2020) as well as the formation of professional skills of a physical education teacher (Sorokolit, Lukjanchenko, Turchyk, & Chopyk, 2021); selection of effective means of physical education from various sports (Khanikiants, Konestyapin, Rymar, Yaroshyk, & Sorokolit, 2021; Rymar, Sorokolit, Solovey, Yaroshyk, & Khanikiants, 2021); improving physical education of middle school age pupils (Sorokolit, Shyyan, Lukjanchenko, & Turchyk, 2017).

The problems of remote physical education are also highlighted by foreign scientists. Some search for effective means of distance online learning (Nining et al., 2021); others study motor activity and sense of security among schoolchildren during the Covid-19 quarantine period (Piestrzyński et al., 2021); some look for the ways to improve online learning with smart devices in the post-pandemic period (Bingbing & Margeviča-Grinberga, 2022).

However, the issue of the impact of distance learning on the quality of physical education lessons in schools, physical fitness of schoolchildren remains unexplored, which formulate the purpose of this research.

The purpose of the research is to monitor the development of physical qualities of 7th grade schoolchildren under the influence of the authorial remote physical education learning programme.

## **Methodology**

Theoretical analysis, generalization of relevant literature sources, as well as sociological method (questionnaire of schoolchildren), educational experiment and mathematical statistics methods were applied in this research. Literature analysis enabled to identify the peculiarities of the physical education of schoolchildren in Ukraine connected with the transition to distance learning mode. The questionnaire of 126 seventh-grade pupils (60 boys and 66 girls) revealed their attitude towards physical education in the conditions of distance learning, its influence on motor activity, their interest in physical exercises and the opportunity to develop physical qualities. The opinion of schoolchildren regarding the effectiveness of physical education tools and features of physical education lessons in remote mode are clarified; impact of distance learning on physical, technical and tactical preparedness is revealed.

The results of the abovementioned theoretical analysis and questionnaire formed the basis of the development of the authorial remote physical education learning programme. An experimental verification of its influence on the dynamics of the physical quality's development was carried out by conducting a pedagogical experiment. The participants of the experiment were schoolchildren of 7th grade, namely 63 pupils (the experimental group (EG) consisted of 33

pupils (16 boys and 17 girls) and the control group (CG) consisted of 30 pupils (15 boys and 15 girls). The toolkit for testing the influence of this programme on the development of speed capabilities was a 30 m run exercise; long jump from a standing position was applied for measuring speed and strength; leaning forward from a sitting position for testing flexibility and bending and extending the arms in a prone position or on the knees (full push-ups; knee push-ups for girls) for testing strength were applied respectively.

The results of the experiment were processed by means of mathematical statistics methods, which provide quantitative and qualitative analysis of the obtained data. When comparing average values in and between the groups, Student's t-test coefficient was used to determine the reliability of the data under study.

### **Research results**

The results of the questionnaire have shown that schoolchildren would prefer in-person physical education lessons. Only 11.11% of pupils stated that online lessons have all the features of a well-organized in-person one. Among those surveyed, 84.12% agreed that the remote form of conducting a physical education lesson affects motor activity, physical fitness and interest in physical exercises. However, 57.15% pointed out a decrease in motor activity during online lessons. Despite this 61.9% believed that the indicators of the development of physical qualities during distance learning remained unchanged since teachers mostly used exercises that had positive effect on physical fitness, namely from aerobics (58.73%); general developmental exercises (42.86%); strength exercises (36.51%). As for schoolchildren's desire to keep remote mode of physical education lessons, 22.22% of the surveyed students answered positively. The percentage of those was higher among girls than boys.

The results of the questionnaire became a prerequisite for developing the authorial remote physical education learning programme, which contains a complex of designed electronic educational and methodical materials for each kind of sport. Synchronous and asynchronous teaching format is used.

Synchronous format meant conducting a lesson according to the schedule by using ZOOM conference facilities and individual consultations with the pupils.

In asynchronous format the pupils received theoretical and practical tasks every week. Those were sets of physical exercises (developed by the authors of the article), videos from YouTube and Tik-Tok.

For control and quality feedback pupils provided media files (photos or videos), PowerPoint presentations, video reports, answers to test tasks. E-mail, Skype, Viber, Telegram, WhatsApp applications were used to check individual

tasks, as well as to establish effective communication. Pupils received points for completing the tasks according to a 12-point rating system.

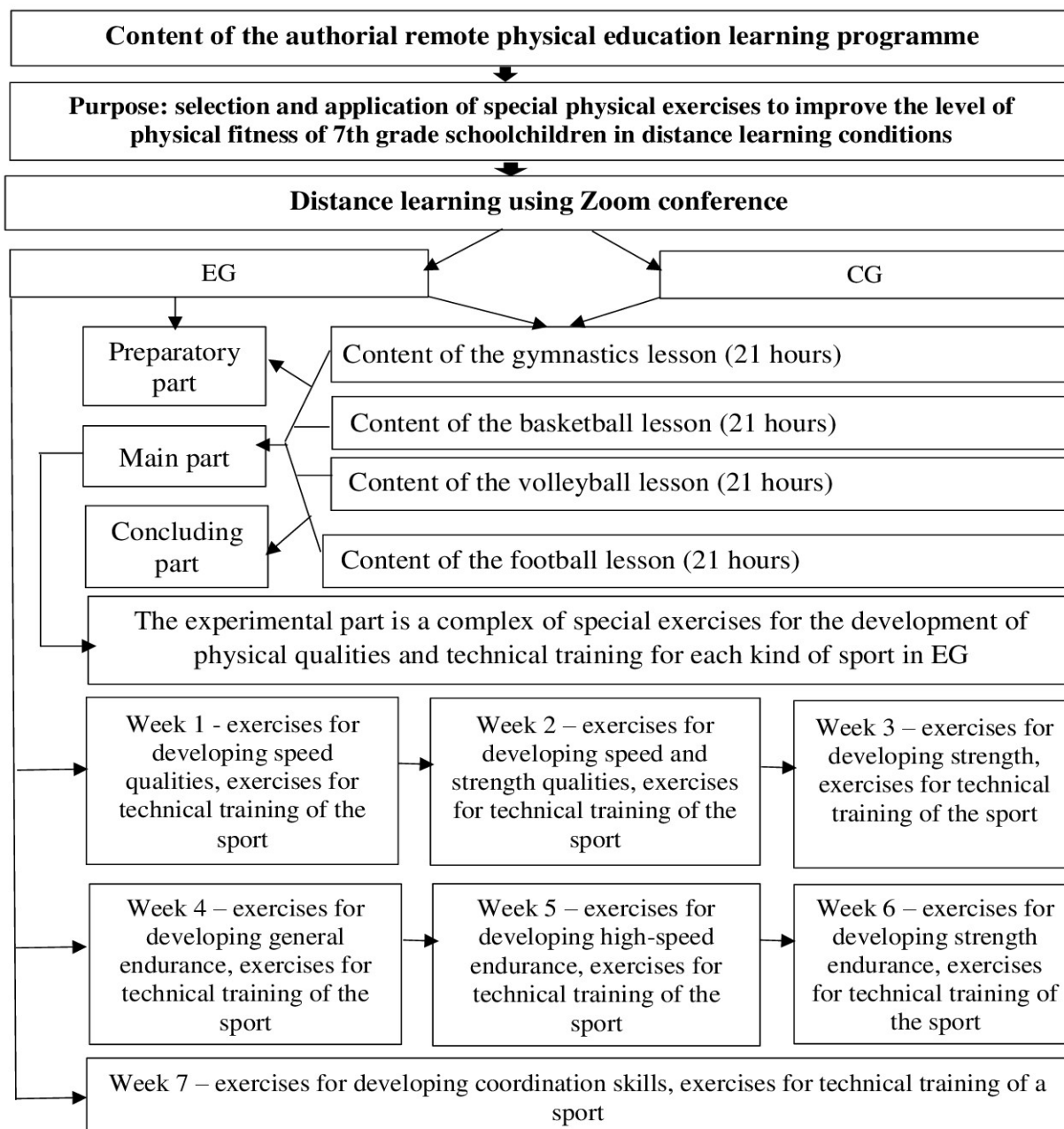


Figure 1 The scheme of the designed authorial remote physical education learning programme (created by authors)

In addition, we used motivational videos for practice in limited space: authorial courses in learning gymnastics, volleyball, basketball, football; video lectures; electronic training manuals and publications on gymnastics, volleyball, basketball, football; literature for students on gymnastics, volleyball, basketball, football; lectures in Power Point format; theoretical tasks and testing (self-

control); video presentations and illustrative material. In case of missing classes pupils were offered to complete individual tasks.

The scheme reflecting the structure and content of the designed authorial remote physical education learning programme is shown in Fig. 1.

The pedagogical experiment has proved the effectiveness of the selected means during remote physical education lessons. In the EG significant and reliable changes in the indicators of physical fitness among boys and girls were observed (Table 1).

**Table 1 Change in the physical fitness indicators in the EG after implementing the means of the authorial remote physical education learning programme (created by authors)**

Test exercise	Gender	Before the experiment	After the experiment	p
30 m run, sec	Boys (n=16)	4,79±0,05	4,48±0,10	p<0,05
	Girls (n=17)	5,37±0,07	4,97±0,06	p<0,05
Long jump from a standing position, cm	Boys (n=16)	196,73±5,48	211,50±4,86	p<0,05
	Girls (n=17)	169,30±3,56	180,33±2,94	p<0,05
Leaning forward, cm	Boys (n=16)	5,53±0,75	9,73±1,06	p<0,05
	Girls (n=17)	9,67±0,76	16,67±0,96	p<0,05
Bending and extending the arms in a prone position / on knees (full push-ups/knee push-ups)	Boys (n=16)	26,20±1,32	38,20±2,44	p<0,05
	Girls (n=17)	15,43±0,84	21,97±1,48	p<0,05

As for the effectiveness of physical education in the CG a statistically significant increase in the indicators of speed qualities for boys, that of flexibility for girls and strength regardless of gender were observed (Table 2).

**Table 2 Changes in the indicators of physical fitness in the CG during distance learning period (created by authors)**

Test exercise	Gender	Before the experiment	After the experiment	p
30 m run, sec	Boys (n=15)	4,88±0,04	4,73±0,06	p<0,05
	Girls (n=15)	5,47±0,07	5,41±0,09	p>0,05
Long jump from a standing position, cm	Boys (n=15)	197,57±4,78	205±5,00	p>0,05
	Girls (n=15)	163,33±4,13	170,33±3,60	p>0,05
Leaning forward, cm	Boys (n=15)	5,93±1,07	7,00±0,95	p>0,05
	Girls (n=15)	11,00±1,26	13,93±1,14	p<0,05
Bending and extending the arms in a prone position / on knees (full push-ups/knee push-ups)	Boys (n=15)	23,67±0,83	27,70±1,04	p<0,05
	Girls (n=15)	14,00±0,84	16,53±0,97	p<0,05

Comparative analysis of the physical fitness indicators of the groups under study proved the effectiveness of the authorial remote physical education learning programme, since the selection of its tools enabled the indicators of physical fitness of the EG participants to improve statistically significant and to establish reliable differences between the majority of their indicators of physical fitness as compared to those of the CG participants (Table 3).

**Table 3 Comparison of the indicators of physical fitness of the EG and the CG schoolchildren before and after the experiment (created by authors)**

Comparison of indicators of speed qualities during the experiment between the EG and the CG (30 m run, sec)							
Gender	Group	Before	t	p	After	t	p
Boys	EG (n=16)	4,79±0,05	1,830	p>0,05	4,48±0,10	2,609	p<0,05
	CG (n=15)	4,88±0,04			4,73±0,06		
Girls	EG (n=17)	5,37±0,07	1,294	p>0,05	4,97±0,06	4,769	p<0,001
	CG (n=15)	5,47±0,07			5,41±0,09		
Indicators of the development of speed and strength qualities during the experiment between the EG and the CG (standing long jump, m)							
Boys	EG (n=16)	196,73±5,48	0,309	p>0,05	211,50±4,86	1,142	p>0,05
	CG (n=15)	197,57±4,78			205±5,00		
Girls	EG (n=17)	169,30±3,56	1,339	p>0,05	180,33±2,94	2,639	p<0,05
	CG (n=15)	163,33±4,13			170,33±3,60		
Indicators of flexibility development during the experiment between the EG and the CG (leaning forward from a sitting position, cm)							
Boys	EG (n=16)	5,53±0,75	0,376	p>0,05	9,73±1,06	2,349	p<0,05
	CG (n=15)	5,93±1,07			7,00±0,95		
Girls	EG (n=17)	9,67±0,76	1,114	p>0,05	16,67±0,96	2,241	p<0,05
	CG (n=15)	11,00±1,26			13,93±1,14		
Indicators of strength development during the experiment between the EG and the CG (full push-ups (boys); knee push-ups (girls); number of times)							
Boys	EG (n=16)	26,20±1,32	1,989	p>0,05	38,20±2,44	4,842	p<0,001
	CG (n=15)	23,67±0,83			27,70±1,04		
Girls	EG (n=17)	15,43±0,84	1,472	p>0,05	21,97±1,48	3,752	p<0,01
	CG (n=15)	14,00±0,84			16,53±0,97		

The conducted research indicates that pupils in Ukrainian schools generally favor in-person lessons over distance learning. Distance lessons have been observed to adversely affect technical training and hinder team interaction. Our findings align with previous research on challenges in organizing remote learning (Bashtenko et al., 2021; Ilnitska et al., 2021).

Nevertheless, it is noteworthy that during remote physical education classes, effective methods for developing physical qualities can be chosen. This observation is supported by the results of scientific research conducted under martial law conditions (Lytvyn, 2022).

## Conclusions

Thus, the results of the pedagogical experiment in the EG make it possible to conclude that the selection of physical education tools that are recommended for implementation in remote physical education are effective for the development of speed, speed and strength qualities, flexibility and strength. Girls had better performance gains in 30 m running exercise and leaning forward from a sitting position, while boys showed better performance during control of speed and strength, and strength qualities.

Conducting physical education lessons in the conditions of distance learning in the CG has enabled to statistically significantly improve the average performance of boys in 30 m run exercise, flexibility range among girls, and strength indicators regardless of gender. However, it is observed that in the CG little attention was paid to the development of speed qualities (for girls), speed and strength (for girls and boys), and flexibility (for boys), therefore no statistically significant changes are detected.

Summing up, the designed authorial remote physical education learning programme proved to be effective, as the selection of its means made it possible to statistically significantly improve the indicators of physical fitness of the EG pupils and to establish reliable differences between the majority of indicators of physical fitness of 7th grade schoolchildren in the EG as compared to those in the CG.

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# SCHOOL LEADERS MATTER: THE ROLE OF SCHOOL PRINCIPALS IN IMPLEMENTING UDL IN K-12 SCHOOLS

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**Abstract.** *The aim of this article is to fill the gap of scientific evidence on the role of school principals in implementing UDL in K-12 schools. The case study research was conducted, and field notes were taken from one district in Lithuania, which has been implementing UDL in its schools since 2019. The data for this research was gathered using in-depth semi-structured interviews involving 5 participants. Based on an inductive thematic analysis, six themes emerged: initiating UDL as an organisational change; planning and ensuring the development of staff competencies related to didactic decisions; initiating changes in teachers' attitudes; motivating teachers to take leadership at the classroom level; promoting the sharing of experiences among teachers (successes and failures); and establishing and maintaining an organisational culture. The discussion explores the implications of the findings for the successful and effective application of UDL in K-12 schools.*

**Keywords:** *K-12 School, Leadership, Principal, Universal Design for Learning.*

## Introduction

In the ever-changing field of education, striving for equal learning opportunities and inclusivity has emerged as a fundamental principle. At the forefront of this transformative endeavour are school leaders, whose role extends beyond administrative tasks to encompass shaping the educational ethos and practices within K-12 schools.

Universal Design for Learning (UDL) is a pedagogical approach designed to ensure all students, irrespective of their diverse abilities and learning styles, have access to equitable learning opportunities. Moreover, UDL is a strategy that increases the level of student engagement (Meyer et al., 2014) and helps to effectively address differences in student learning in the classroom (Kressler & Kressler, 2020). Overall, UDL has gained popularity in K-12 schools due to its emphasis on inclusive practices through purposeful design in teaching and learning, making it a sustainable approach for accommodating diverse learners (Fovet, 2020).

Research indicates that school leaders play a central role in helping teachers to effectively apply new educational strategies or to manage changes in their practice (Nedzinskaitė-Mačiūnienė et al., 2022; Clayton & Goodwin, 2015). The school principal's leadership in teaching also positively affects teachers' motivation, satisfaction, self-confidence, and sense of security (Grillo, 2021; Harris, 2013; Hattie, 2012). School leaders' involvement in implementing UDL in K-12 schools is essential, given their significant influence on moulding the educational environment, policies, and practices. They are responsible for modelling UDL instruction and creating a shared vision for UDL implementation in the school (Novak, Woodlock, 2021). Moreover, they are responsible for changing current teacher professional development practices in line with the UDL strategy (Fovet, 2020). School leaders are also responsible for allocating human and material resources to support the implementation of UDL. Hence, the involvement of school leaders in the UDL implementation process can enhance student achievements and promote greater inclusivity in schools (Grillo, 2021). Therefore, the main aim of this article is *to explore the role of school principals in implementing UDL in K-12 schools in Lithuania*.

The following sections of the article begin with a literature review. Then, the research methodology, which is based on an explanatory case study, is elaborated upon. Lastly, the study presents the research findings and a discussion derived from the inductive thematic analysis carried out.

### **Literature review**

#### ***Universal Design for Learning (UDL)***

UDL operates on the principle that teaching and learning cannot be standardised to a one-size-fits-all approach. It emphasises the importance of developing flexible learning environments that cater to the diverse needs of students, encompassing individuals with disabilities, different cultural backgrounds, and diverse learning styles. Most importantly, UDL is a scientifically sound framework that guides educational practices, recognising student diversity, aiming to minimise barriers to learning, and upholding high expectations for all students (CAST, n.d.).

UDL is not a solution that works universally; rather, it is a set of curriculum design principles that empower all students to reach their full learning potential by ensuring fair and equal opportunities. Meyer et al. (2014) argue that the UDL principles create three interrelated brain networks: the recognition network, the strategic network, and the affective network. First of all, learners perceive the information provided through the recognition network. Subsequently, learners engage with and act upon this information through the strategic network. Finally, learners establish emotional ties with the provided information through the affective network. Based on these interrelated brain networks, UDL incorporates

three principles: 1) providing diverse ways of representation (providing information in various formats); 2) offering diverse ways of engagement (providing multiple means for students to engage with content); and 3) providing diverse ways of expression (enabling students to showcase their comprehension skills in different ways) (Meyer et al., 2014). By applying the above principles, teachers can ensure that every student has the potential to become an expert learner. While an expert learner might not be the highest-achieving student, he/she demonstrates curiosity, motivation, and a readiness to take responsibility for his/her own decisions, persisting with experimentation of new strategies until he/she reaches his/her goals (Novak, 2019). While UDL focuses primarily on curriculum, instruction, materials, and assessment, the importance of physical spaces and school infrastructure in creating inclusive learning environments must also be recognised (Rogers-Shaw et al., 2022). In summary, UDL is a strategy for implementing inclusive education by reducing barriers to learning and promoting expert learners.

### ***The Role of School Principals in the Context of Change***

Research (e.g., Fullan, 2007; Leithwood et al., 2007) has shown that the principal is the most important factor in implementing changes and innovations in the school. Studies place great emphasis on school principals' skills and abilities, including their ability to instigate the process of change (Kin et al., 2018), their ability to manage change (Kotter, 2012), their ability to facilitate change (Fessehatsion, 2017), their ability to prepare staff for change (Baesu, Bejinaru, 2013), and various other related abilities. The role of school principals therefore goes beyond administrative tasks and plays a central role as a catalyst for change within the educational institution (Fullan, 2007).

School principals are responsible for raising awareness of the necessity for change, developing a vision and strategies for change, and communicating these to all stakeholders (Corrigan & Merry, 2022). Principals also need to provide support, motivation, and empowerment for teachers to ensure a smooth change process (Govindasamy & Mestry, 2022). Walk's (2023) research illustrates a direct correlation between leaders' resistance to change and the resistance exhibited by their followers. Furthermore, as noted by Marzano et al. (2005), school principals need to ensure that teachers have the resources, materials, and support they need to implement changes effectively.

MacFarlane and Woolfson (2013) claim that teachers' instructional behaviour is most often predicted by what they believe their principal expects. Moreover, the principal's expectations shape teachers' positive or negative attitudes or beliefs about their instructional practice (Grillo, 2021). Hence, the school principal's role as a facilitator of change is interconnected with his/her role as an instructional leader. Acting as instructional leaders, school principals are

entrusted with the duty and the official capacity to establish an environment conducive to curriculum and instruction that integrates contemporary principles of teaching and learning in schools.

However, it is essential to highlight that in the current age of complexity, district-level support and structural changes are also needed to enable principals to manage changes effectively.

## Materials and methods

To offer insights into the research question of this study—*What is the role of school principals in implementing UDL in K-12 schools?*— a qualitative research design and an interpretative research paradigm were chosen.

### *Participants*

UDL as a framework was introduced to the Lithuanian community of educators as part of the informal teacher development programme in the national project “Time for Leaders” (2019–2020). This study is based on research carried out in *one municipality* that joined the project in 2019 (a total of 20 schools of different types participated in the project). The *case study* research was conducted, and field notes were taken in *three schools*, which have continued to implement UDL after the project, and in the *Education Department* of the municipality. A total of five informants participated in this study (codes: I1- teacher, I2, I3 vice-principals, I4 - representative of the municipality, I5 principal).

### *Data Collection*

The data forming the basis of this study were collected through *in-depth semi-structured* interviews. This type of design allowed the research problem to be explored from multiple perspectives (Creswell & Clark, 2010). In addition, this type of data collection was the most appropriate method because it allowed for the exploration of individual experiences and/or opinions regarding the phenomenon under study. The interviews consisted of a series of open-ended and closed-ended questions related to the implementation of UDL in school life. These questions were formulated in line with Novak and Rodriguez’s (2016) proposed and explained five phases of the UDL implementation process: explore, prepare, integrate, scale, and optimise.

In a study with a relatively small sample size, such as this one, the focus is not so much on comparing the cases. Therefore, the questions do not need to be very standardised and can be relatively open.

The study was conducted in 2021–2022. The interview lasted between 30 and 40 minutes.

### Data Analysis

This study employed inductive thematic analysis to analyse the qualitative data (Braun & Clarke, 2006). Thematic analysis was carried out by means of the following steps: transcription, reading and familiarisation, coding, searching for themes, reviewing themes, defining, and naming themes (Braun & Clarke, 2006). All transcripts were carefully examined several times; the thematic method outlined a process for thoroughly identifying, analysing, and summarising themes within the data set to uncover recurring patterns of meaning.

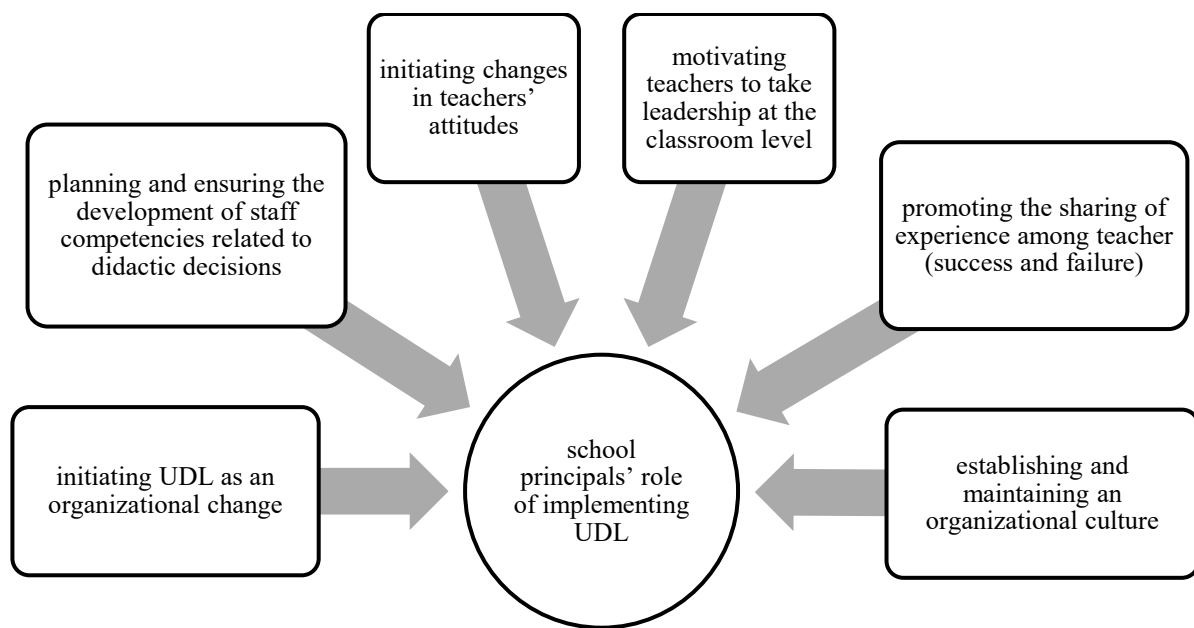


Figure 1 **Sub-theme map** (created by authors)

The data were examined and the findings were organised around the central theme—*the role of school principals in implementing UDL*. The analysis of the qualitative data revealed six sub-themes (see Figure 1).

### Trustworthiness

The trustworthiness (Korstjens & Moser, 2018) of this research was ensured in several ways. All transcripts and written materials were meticulously reviewed several times by two researchers independently. The thematic method outlined a process for thoroughly identifying, analysing, and summarising themes within the data set to uncover recurring patterns of meaning. The sub-theme schemes developed by the researchers were critically reviewed by the research team; a comparative analysis was performed, and an integrated approach was established, thereby enhancing the confirmability and reliability of this research.

## **Research results**

### *Initiating UDL as an organizational change*

The schools participating in the study come from one region. In 2019, they all joined the project, so that a total of 20 schools of different types (preschools, primary school, basic schools, and gymnasiums) participated in the project. The basic principle was that each school should have a team consisting of the school leader (the principal or the deputy) and **volunteer** teachers. Three school representatives and one informant from the Education Department participated in the study. In all of these schools, UDL implementation processes have continued to be implemented after the project. The project involved between 3 and 10 volunteer school representatives from each school.

### *Planning and ensuring the development of staff competencies related to didactic decisions*

Teachers who participated in the project shared their experiences with other schoolteachers; the dissemination of good practices took place in methodological groups. A large conference was also organised to introduce teachers to the UDL strategy. As one informant said, “UDL is not something completely new. Teachers have been applying many aspects of UDL, but they don’t recognise them as UDL” (I1).

“The whole community was familiarised with UDL during the project meetings. Then we looked for volunteer teachers who would try to implement UDL in the educational process. I would say that the sharing of experiences between teachers in the district was the greatest success” (I4).

“Information about the UDL strategy was provided to the pedagogical community during the teacher meetings and individually” (I3).

### *Initiating changes in teachers’ attitudes*

Introducing innovations into the educational process is not easy, and there is often resistance to change within communities. As one informant notes, “I would call it a challenge to change teachers’ attitudes that UDL is only for students with special needs. Other teachers said they had been doing things the same way for a long time, and there was no need to change” (I2).

Another informant says: “Changing attitudes is a long and time-consuming process. I don’t think that forcing all teachers to switch to the UDL strategy would be effective. It’s important to get to know your team, to understand what they live for and what they’re interested in, and to find out who needs more encouragement, who needs a firmer word, and so on. In our school, we didn’t start implementing

UDL at the school-wide level; we started with volunteers who became leaders in implementing UDL practices” (I5).

In their statements, the informants revealed that “there are still teachers who believe that students should adapt to the teacher and not the other way round. Hence, we need to watch films, read books about the UDL strategy, and include the topic of the integration of UDL in the annual performance reviews with teachers” (I1).

“Some need to be pushed, others need to be praised and encouraged, and find ways to reach them. In general, a lot is done to change teachers’ attitudes and to see the child” (I3). An essential aspect was highlighted: “It is necessary to build teachers’ self-esteem so that they can implement UDL” (I2).

The informant from the Education Department noted that “the most important thing is that the leader is part of the team and understands where the school is heading. This is related to changing attitudes, so teachers need human support,” and at this point, the informant highlights the role of the leader (I4).

#### *Motivating teachers to take leadership at the classroom level by implementing UDL*

The research revealed that the teachers were motivated to become leaders in a number of ways. “Volunteer teachers participated in the training, were given homework, and had to try to apply in their lessons and share their experiences with other colleagues. An important condition was that students and parents should be informed about UDL” (I5).

Another strategy for motivating teachers to take on leadership was identified as classroom observation. “In this way, school leaders could see that teachers are actually using UDL elements even though they claim they are not”. The informant noted that “we need to show teachers that they are already using UDL elements and where more UDL elements could be incorporated into the educational process” (I3).

#### *Promoting the sharing of experiences among teachers, identifying both success and failure factors*

All the informants noted that it was not easy to engage unmotivated teachers in this change.

It was emphasised that “the most important factors include focusing on staff, recognising their work, praising them, and motivating them. Teachers need to feel supported by their leader because, in implementing UDL, they take on additional, previously unfamiliar, and complex tasks when they could have chosen to do nothing and work as they always have” (I2). The data analysis revealed the goal of the leaders: “We should strive that as many teachers as possible deeply



understand the UDL strategy, note its differences from differentiated instruction and individualisation, practically apply UDL or its elements, share their good experiences, and communicate about the differences” (I5). It was noted that frequent changes in various requirements related to the planning of school activities and lessons posed certain challenges in their implementation in practice. A lot of time, effort, practical experience, and a sense of meaning in the innovation were required for change and innovation to come into the classroom and become sustainable. One informant claimed that “we aim to reduce challenges and barriers by drawing on teachers’ experiences and encouraging them to share good and specific examples. In this regard, the most significant help comes from teachers’ collegial assistance and active leadership” (I4).

“Teachers who implement UDL in their work are invited to practical experience-sharing events where they share their positive experiences. Teachers who use UDL systematically and consistently experience more success in their work and are able to see the benefits of UDL by observing changes in students’ learning,” claimed the informant (I3).

#### *Establishing and maintaining an organisational culture based on the UDL principles*

In the context of implementing UDL, several aspects of changing an organisation’s culture emerged. One informant noted that “in the school’s strategic document, a direction for UDL implementation has emerged in terms of measures, goals, and the alignment of UDL with the school’s vision. For example, there is a provision that all lessons should end with reflection and that teachers should apply and focus on formative assessment” (I5).

Another informant argued that there is a long way to go before UDL becomes part of the culture of the institution. The informant doubted whether “the UDL strategy based on the school’s culture exists in the gymnasium; it’s just the beginning of the journey”. The informant noted that they encountered a sceptical attitude from many teachers: “Why should we change our approach to education? Where would we find the time for such changes? It’s complicated to implement, and it’s unclear whether UDL will improve the performance of students and others. When implementing organisational culture change, it’s important not to rush and to implement it slowly because it takes time” (I2).

It was noted that “the change in the educational process occurred to the extent that the teacher planned and implemented it. However, communication between teachers changed, i.e., teachers began to offer students a choice of learning resources, learning methods, and assessments. When these UDL elements become part of every lesson, students naturally choose learning materials, whereas the change that used to require a lot of attention becomes a standard learning environment. Integrated science tasks and long-term science

projects are prepared applying UDL. To ensure the implementation of UDL, we looked for opportunities for additional funding for this activity (both for the purchase of educational resources and for the remuneration for teachers' work). When planning activities for 2023, activities integrating UDL elements are also planned in cooperation with the pedagogical community" (I3).

### *The Role of School Principals*

All the informants emphasised that the key role of a leader is to ensure continuous encouragement, support, consultation, assistance, and trust in teachers.

"It's important to make sure that teachers have the necessary resources. Without creating a high-quality learning environment that guarantees choices, one cannot expect systematic implementation of UDL. It's crucial to have an agreement on the application of the UDL strategy, ensuring the necessary resources for UDL-based education and the development of teacher qualifications" (I3). "Once the decision has been made to implement the UDL strategy, the role of the leader is to ensure that all teachers learn to apply UDL with students of all age groups. Preliminary agreements and funding for the provision of resources needed for the UDL strategy are important. Given the opportunity to choose resources, teachers would naturally accept the application of the UDL strategy in planning and implementing the curriculum" (I3). "I see my role as a principal as leadership in general. First and foremost, it's about motivating staff, preparing them for change, creating conditions, and empowering staff members to act and participate in changes as well as encouraging them to be leaders in the classroom and initiators of change in the school culture. All these things are important, including the implementation of UDL" (I1).

Ensuring the implementation of change and sustainability requires the school leader to actively participate and learn together with teachers, "because the leader is a supporter, a spiritual supporter, and a financial supporter, a supporter of the environment and spaces..." (I4).

The leader has the power to encourage teachers to voluntarily embark on the UDL journey, which is a voluntary process. Another important aspect is that the leader can help teachers who are implementing UDL by not overburdening them with additional activities but, where possible, freeing them from tasks. Another crucial aspect is that the sustainability of UDL depends on the leader and on how much UDL remains in schools after the project.

### **Discussion and conclusions**

Grillo's (2021) study shows that the majority of teachers already hold favourable attitudes towards inclusivity-oriented teaching practices like UDL, but

insufficient support from the school administration hinders the successful implementation of the strategy. Therefore, presented study aimed to provide answer regarding *what is the role of school principals in implementing UDL in K-12 schools in Lithuania?*

The data of our study revealed that in implementing the UDL principles in practice, school principals envisage the importance of their leadership in the following areas: initiating UDL as an organisational change; planning and ensuring the development of staff competencies related not only to didactic decisions, but also to changes in teachers' attitudes; motivating teachers to take leadership at the classroom level by implementing UDL; as well as promoting the sharing of experiences among teachers, recognising both success and failure factors. An important aspect of school principals' activities is the provision of technologies and resources needed to change educational practices at school. The main challenge for school principals is to establish and maintain an organisational culture based on the UDL principles.

In summarising the findings of this study, it is important to note that school principals serve an important leadership function as facilitators in the process of implementing UDL (Pan & Franklin, 2011). It should also be pointed out that school leaders play a crucial role in establishing schoolwide support for UDL (Fovet, 2020). In this particular context, the importance of distributed leadership is highlighted, with a specific emphasis on collaborative practices aimed at meeting the needs of all stakeholders (Drescher et al., 2014) and increasing the efficiency of the organisation as a whole (Bergman et al., 2012; Wang et al., 2014). In addition, school principals' instructional leadership plays an important role in implementing UDL in school practice (Grillo, 2021). Research by Carson et al. (2007) shows that when the school principal exhibits instructional leadership practices, teachers are more inclined to engage in self-reflection, enhance teaching practices accordingly, take risks, adopt new teaching strategies, be more mindful of student diversity, and prepare and plan lessons more carefully.

This study expands the scope and content of management and leadership research by identifying school principals' roles, main responsibilities, and challenges implementing new practices.

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# PEDAGOGISKĀ TEĀTRA METODE MULTISENSORĀS PIEEJAS IETVAROS KARJERAS IZGLĪTĪBĀ SKOLĀ

## *Pedagogical Theatre Method within the Multisensory Approach in Career Education at School*

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**Abstract.** Career is an important area of life, the development of which should be developed as early as school years. It is important to help a student get as much information as possible about opportunities in their career choices from the start of primary school, help them find the right direction for them, knowing their desires, skills and talents. Insufficient methodological support for primary school pupils in early stages of career education determines the problem of the study. The aim of the study is to theoretically investigate the Pedagogical Theater Method, to develop a Multisensory Approach Scheme Using the Theater Method to promote the development of students' sensory awareness in career education in the 5th Grade. A 24 pupil's survey was conducted, descriptive statistics were used for data processing. Pedagogical theater method develops the skill of using the senses (sight, hearing, taste, smell or touch) and using real life experience, thus expanding opportunities for self-discovery and choosing a potential future career. The Multi-Sensory Approach, when several senses are stimulated at the same time, methodically using purposefully prepared tasks, promotes the development of students' sensory awareness, which can be used in career education and choosing a future profession. The Pedagogical Theater Method organically fits into the implementation scheme of the Multisensory Approach in Career Education for the 5th Grade. The Pedagogical Theater Method is suitable for the implementation of career education in work with pupils.

**Keywords:** career education, multisensory approach, pedagogical theater method, senses.

### **Ievads**

#### *Introduction*

Karjeras izglītības īstenošana skolās šobrīd nav vienotas sistēmas. Katra mācību iestāde darbojas izvērtējot savas iespējas. Ir daudzas skolas, kurās ir karjeras konsultants vai vairāki konsultanti, taču ir skolas, kurās nav konsultantu un karjeras izglītība atkarīga no klašu audzinātāju iniciatīvas un skolas vadības ieinteresētības. Daudzas skolas iesaistījušās karjeras izglītības īstenošanā, tās darbojas Eiropas Savienības projektā “Karjeras izglītības programmas nodrošinājums izglītības sistēmā” (KIPNIS), sadarbojas ar Profesionālās karjeras

izvēles aģentūru (PKIVA), kā arī Nodarbinātības valsts aģentūru (NVA). Pateicoties šim darbam, skolām ir daudz informatīvu materiālu, metodiku, plānošanas instrumentu, rokas grāmatas (VIAA, 2014) un piedāvājumu piedalīties karjeras pasākumos.

L. Reece uzsver karjeras izglītības nozīmību sākumskolas posmā. Viņa uzskata, ka bērnu centienus veido ģimene un viņu skolotāji bērnības gados. Tas nosaka bērnu mērķu sasniegšanu. Iekļaujot karjeras izglītību pamatskolas izglītībā, tiek paplašinātas iespējas, izlīdzinātas atšķirības un uzlabotas vēlākas izvēles iespējas (Reece, 2018). Karjera skolās ir informējoša rakstura. Lai sniegtu karjeras konsultācijas, pedagogiem ir jābūt konsultēšanas prasmēm, un, lai viņus stiprinātu, REFORM projekts izstrādāja metodiku, kas piedāvā karjeras konsultēšanas metodes (Cesie, 2021). Karjeras attīstības atbalsta mērķis skolā ir sniegt skolēniem nepieciešamo informāciju par darbu un profesionālajām jomām, iespēju piedalīties tehnoloģiju un zinātņu nozaru laboratorijās, piedzīvot jaunas mācību un darba metodes (European Commission, 2022; Niles, Harris-Bowlsbey, 2012).

Pētījuma problēmu nosaka nepietiekams metodiskais atbalsts pamatskolas skolēniem karjeras izglītībā sākuma posmā, kad īpaši svarīgi ir palīdzēt skolēniem apzināties savu karjeras ceļa virzienu. Ir dažādas iespējas pamatskolas pēdējos gados piedalīties projektos, doties uz individuālajām konsultācijām pie karjeras konsultanta, vasarās uzsākt darba gaitas jau no 14 gadu vecuma. Taču jaunākiem skolēniem ir svarīgs pieaugušo atbalsts. Pēc autoru domām, svarīgi ir katram atrast pareizo pieeju un veicināt viņa individualitāti, palīdzēt katram skolēnam izprast sevi ar multisensorās pieejas palīdzību, lai veicinātu maņu apzinātību, zinātkāri, novērtētu savas stiprās puses un nepieciešamību tās attīstīt.

Pamatojoties uz neirolingvistiskas atziņām (Baltušīte, 2000), skolēni mācās, izmantojot redzi, dzirdi, ožu, garšu un tausti, skolēni kopumā informāciju saņem pa vienu vai vairākiem kanāliem. Multisensorā pieeja ir vismaz divu vai vairāku maņu izmantošana vienlaikus. Šis mācīšanās stils veicina tādu darbību izmantošanu, kas piesaista mūsu redzes, dzirdes, kinestētiskās (just ar visu ķermeni) un taustes sajūtas (Teachment, 2023).

**Pētījuma mērķis ir** teorētiski izpētīt pedagoģiskā teātra metodi izmantošanai pamatskolā, izstrādāt multisensorās pieejas shēmu, izmantojot teātra metodi, lai veicinātu skolēnu maņu apzinātības attīstīšanu karjeras izglītībā 5. klasē.

## **Metodoloģija** *Methodology*

Pētījums izstrādāts Latvijas Biozinātņu un tehnoloģiju universitātē Izglītības un mājsaimniecības institūtā maģistru studiju *Karjeras konsultants* ietvaros.

Pētījuma jautājums: Kāds ir 5. klases skolēnu viedoklis par savu maņu apzināšanos, pielietojot pedagoģiskā teātra metodi, pirms un pēc multisensoro etīžu par profesijām izspēlēšanas.

Pētījuma metodes: anketēšana.

Anketēšana veikta 2023. gadā Rīgas Juglas vidusskolā, kopā piedaloties 24 piektās klases skolēniem, Gan pirms, gan pēc katras multisensorās etīdes izspēlēšanas, skolēni atbildēja uz anketas jautājumu par maņu apzināšanos (redzi, dzirdi, tausti, ožu vai garšu), izmantojot teātra metodi. Pētījuma datu matemātiski statistiskai apstrādei izmantota aprakstošā statistika (moda, mediāna, amplitūda).

Lai izmantotu multisensoro pieeju, šī pētījuma ietvaros 2022. gadā tika izpētītas un izvērtētas teorētiskās atziņas par multisensorās pieejas izmantošanu karjeras izglītībā 5. klasē (Tūtere, Baltušīte, 2022). Savukārt, 2023. gadā izstrādātas etīdes par profesijām, ar kuru palīdzību skolēns var atrast sev piemērotāko karjeras izvēli (Šmite, Dišlere, 2023).

Pedagoģiskā teātra elementu struktūra un Multisensorās pieejas shēma, izmantojot teātra metodi, izstrādāta balstoties uz zinātniskās literatūras studijām un autoru darba pieredzi.

## **Rezultāti un diskusija** ***Results and Discussion***

### **Multisensorās pieejas būtība**

Pētījumi par visām multisensoriskajām lietām ir burtiski attīstījušies kopš Starptautiskā multisensoro pētījumu foruma (The International Multisensory Research Forum (IMRF)) aizsākšanas Oksfordā 1999. gadā (Fuxe & Molholm, 2009). Kā cilvēks uztver savu dabisko vidi, izmantojot vairākas sajūtas, ir bijis izaicinošais un aizraujošais jautājums daudzozaru pētnieku kopienas uzmanības centrā ikgadējā IMRF sanāksmē, kas pēta multisensoru integrāciju vairākos līmeņos, sākot no neurofizioloģijas līdz uzvedībai, ar pētniecības interesēm no teorijas līdz lietojumiem (Meyer & Noppeney, 2011). Multisensorās pieejas izmantošanas rokasgrāmatā sintezētas galvenās tēmas šajā strauji augošajā jomā gan izprast fizioloģiju, gan izpētīt mijiedarbību starp dažādām maņu modalitātēm (Stein, 2012).

P. Pagliano (Pagliano, 2012) rokasgrāmatā raksta, ka mūsu maņas savieno mūsu smadzenes ar konkrēto pasauli, ieskaitot mūsu pašu ķermeni, un tas ir būtiski mūsu izdzīvošanai. Joprojām notiek daudz diskusiju par to, tieši cik mums ir dažādu maņu, vai skaitlis ir pieci, sešpadsmit vai pat augstāks, un to relatīvā nozīme vienam pret otru. Lieki piebilst, ka mēs esam multisensoras būtnes, un mēs dzīvojam multisensorā pasaulē.

Teorētiskā bāze multisensorās pieejas izmantošanai tika veidota, pamatojoties uz autoru atziņām par multisensoro pieeju izglītībā (Praveen, 2021; Pučuka, 2019; Bremner, Lewkowicz, & Spence, 2012; Baines, 2008), neirolingvistiskās programmēšanas ietvaros (Baltušīte, 2000; Tosey & Mathison, 2006); no



psiholoģiskiem aspektiem (Regan, 2023; Stahl, 2019; Rubene, 2017) saistībā ar cilvēka maņām.

Multisensorās mācīšanās priekšnoteikums ir vienkāršs. Kad skolēni izmanto vairāk nekā vienu sajūtu vienlaicīgi vai īsā laika periodā, tie mēdz intensīvāk mijiedarboties ar mācību materiālu un labāk atceras to, ko viņi ir mēcījušies ilgāku laiku. Multisensorajās mācībās skolotājs iesaista skolēnus ar dažādiem stimuliem - praktisko, vizuālo, dzirdes un ožas palīdzību, pēc tam saista darbību ar atbilstošiem mācību mērķiem. Izmantojot abpusējas attiecības starp sensoro ievadi un domāšanu, multisensorās tehnikas iegūst savu spēku (Baines, 2008).

Multisensorā pieeja karjeras izglītībā skolā saistās ar dažādu mācīšanās stilu un metožu izmantošanu. Mācot tiek iekļautas praktiskas aktivitātes: lomu spēles, interaktīvi uzdevumi, kuros tiek iesaistītas skolēnu maņas. Piesaistot skolēnu sajūtas veidojas mācību vide, kas veicinot skolēnu zinātkāri un izpratni par karjeras attīstības procesiem.

Cilvēkam ir 5 maņas - redze, dzirde, oža, garša, tauste. Maņas palīdz cilvēkam iepazīt apkārtējo pasauli, orientēties apkārtējā vidē un palīdz ikdienas situācijās izvairīties no briesmām.

Skatoties attēlā, cilvēks spēj sajūst smaržas un garšas, pateicoties savai atmiņai - iepriekš piedzīvotajam. Smaržas un garšas garīgie tēli ir definēti kā ožas vai garšas notikumu īstermiņa atmiņas attēlojumi, kas rada pieredzi "smaržot ar prāta degunu" vai "garšot ar prāta mēli". Tāpat kā ar vizuāliem attēliem, arī smakas un garšas garīgie attēli saglabā dažus ožas un garšas uztveres aspektus (Lacey & Lawson, 2013).

Ar maņu palīdzību skolēni varēs pārbaudīt sevi un iegūs pamata zināšanas par to pielietošanu dažādās profesijās.

Multisensoro mācību metožu izmantošana nozīmē palīdzēt bērnam mācīties caur vairākām maņām. Lielākā daļa mācību metožu tiek veiktas, izmantojot redzi vai dzirdi (redzes vai dzirdes). Skolēna redze tiek izmantota informācijas lasīšanai, teksta, attēlu skatīšanai vai informācijas lasīšanai no tāfeles. Dzirdes maņa tiek izmantota, lai klausītos skolotāja teikto. Dažreiz bērna dzirdes apstrāde var būt vāja. Šo grūtību risinājums ir vairāk izmantot bērna maņas, īpaši pieskārienu (tauste) un kustību (kinētisko). Tas palīdzēs bērna smadzenēm attīstīt taustes un kinētiskās atmiņas, pie kurām pieķerties, kā arī dzirdes un vizuālās atmiņas (Praveen, 2021). Ir daudzas metodes: foto, video, reklāma, 3D brilles, mūzika, kas tiek izmantotas, lai uzlabotu skolēnu zināšanas un prasmes (Rubene, 2017; Bremner et al., 2012). Ar konkrētām sajūtām, sensoriem, varam atsaukt atmiņā jau iepriekš pieredzēto un apgūto. Mums katram ir viena dominantā sajūta, bet arī pārējās varam attīstīt ar atbilstošiem vingrinājumiem un metodēm. Mūsdienās sauklis – Multisensorā izglītība ikvienam! – ir ļoti aktuāls. Ziemeļvalstu sistēmā tas jau darbojas zem cita koncepta - pieredzes izglītība (learning by experiencing) (Pučuka, 2019). No psiholoģijas viedokļa multisensorā metode tiek definēta kā pieeja mācību procesam, kas ietver vizuālās, dzirdes, kinestētiskās un taustes modalitātes (APA

dictionary, 2023). Savukārt psiholoģijas vārdnīcā tā ir definēta kā mācīšanās metode, kurā informācija tiek sniegta, izmantojot dažādas modalitātes, piemēram, ar verbālām un vizuālām norādēm (Psychology Dictionary, 2013).

Izmantojot multisensoro pieeju etīdēs par profesijām, balstoties uz spēju atšķirt maņas, skolēniem tiek palīdzēts noskaidrot sev piemērotas profesijas. Multisensoro etīžu izspēle, pielietojot teātra metodi lomu spēlēs, veido izpratni par multisensoro maņu izmantošanas iespējām karjeras izvēlē.

### **Pedagoģiskā teātra metodes izmantošana skolā**

Teātra metodes 21.gadsimtā mainās un kļūst ne tikai par profesionāļu darba rīku, bet ir pieejamas katram cilvēkam. Teātris ir māksla, un teātra metodes var izmantot arī sabiedrības un indivīdu transformācijai un pārmaiņu rosināšanai. Tā ar iztēles burvību un neierobežotību, ļauj mums uz ikdienu paskatīties no cita redzesloka, atklāt jaunus risinājumus un iespējas, izprast sevi, savu ķermeni, emocijas un sajūtas.

Methodiskā spēle ir paņēmiens vai aktiermākslas veids, kurā aktieris tiecas veicināt sirsnīgu un emocionāli izteiksmīgu priekšnesumu, pilnībā iejūtoties varoņa lomā. Tā ir uz emocijām orientēta tehnika klasiskās aktiermākslas vietā, kas galvenokārt ir balstīta uz darbību (Preiļi izglītotai Latvijai, 2018).

Pēc autoru domām, pedagoģiskais teātris ir metode, kas iegulda visus radošuma elementus vienā praktiskā uzdevumā, ko spēlē skolēnu grupas. Tā ir neatkarīga disciplīna, kas apvieno gan teātri, gan pedagoģiju. Teātra pedagoģija ir attīstījusies atsevišķi no drāmas izglītības. Drāmas skolotājs māca izrādes metodiku, teoriju un praksi. Atšķirība ir tāda, ka teātra pedagoģija integrē gan mākslu, gan izglītību, lai attīstītu valodu un stiprinātu sociālo apziņu. Teātra pedagoģija kā nozare radusies 20. gadsimtā.

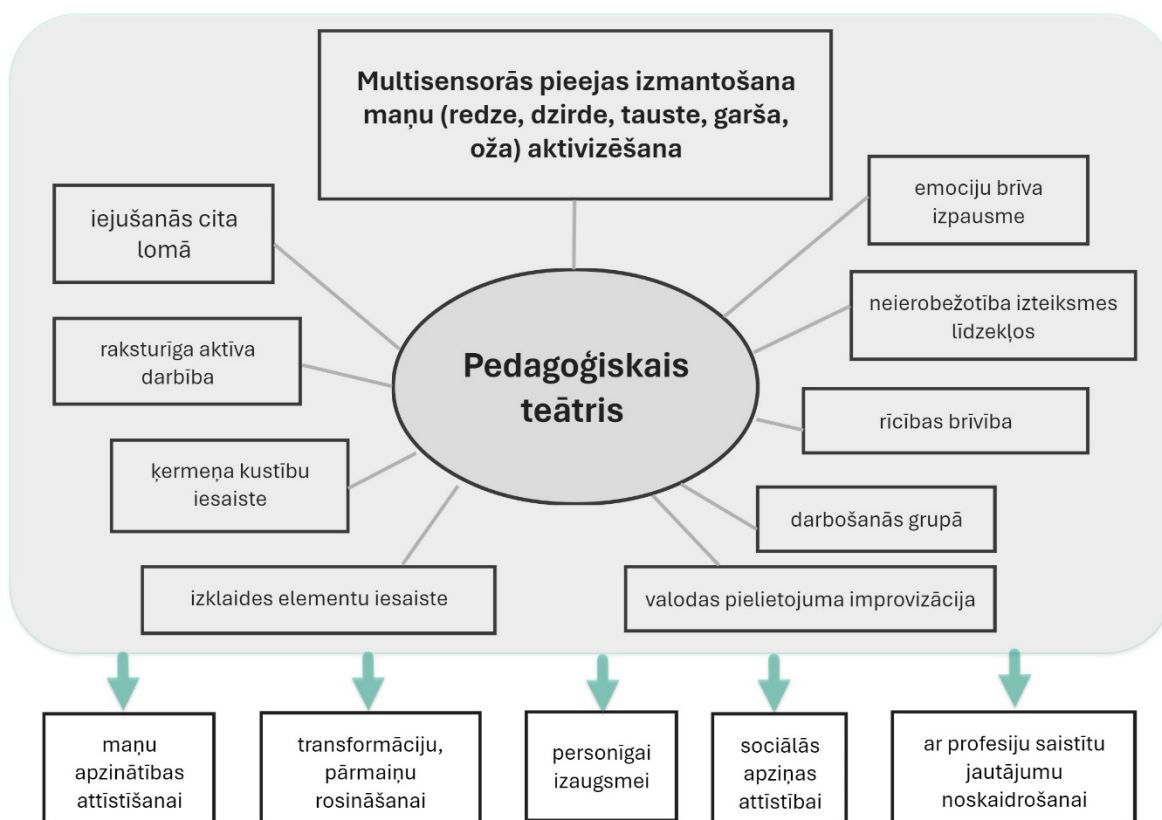
Pedagoģiskais teātris vēsturiski ir neformālā izglītība pedagoģijā. Drāmas pedagoģijas pieejas, principus, jaunas metodes izmantoja un šobrīd izmanto skolotāji praktiski daudzās valstīs, piemēram, Austrālija, Īrijā, Dienvidāfrikā, Zviedrijā, ne tikai drāmas neformālajā izglītībā, bet arī visā formālajā izglītībā – iekļaujot drāmas elementus kā mācīšanās paņēmienus un metodes dažādos priekšmetos, tādējādi padarot drāmas pedagoģiju universālu, pastāvīgi klātesošu visur mācību procesā.

Viena no bērnu un jauniešu neformālās izglītības formām ir teātra mākslas neformālā izglītība, kas savu teorētisko un metodisko bāzi rod drāmas pedagoģijā. Skolas drāmas pulciņiem, publiskās runas fakultatīviem kursiem un drāmas studijām ir nozīmīga loma, un tie veicina skolēnu personības attīstību, socializāciju, stiprina personīgo identitāti, attīstot inteliģences līmeni un uzlabojot psiholoģisko veselību.

Mūsdienās popularitāti ir ieguvis arī Multisensorais teātris, kas ir multisensors un pilnībā interaktīvs. Izrādē ir iekļauti dažādi maņu elementi, kas jāizpēta, piemēram, garša, skaņa, pieskāriens, smarža vai lietas, ko redzēt (Concrete Youth, 2023). Var teikt, ka izglītojošais teātris ar izcilību ir kļuvis par izglītības procesa sirdi (Exodus, 2021).

Populārs ir arī sensoriskais labirinta teātris, kas iesaista visas maņas, strādājot ar smaržām, skaņām, tausti, garšu, kinestēziju un redzi. Protams, viss teātris zināmā mērā ir sensorisks, taču šeit lielāks uzsvars ir uz mazāk izmantotajām maņām. Tas ir labirints, jo skatītāji ceļo pa ceļu, ko iedvesmojusi ideja, kas iekapsulēta klasiskā labirinta formas vienotā ceļā. Kas attiecas uz teātri, neskatoties uz to, ka izrādes nenotiek parastajā teātra ēkā, tām joprojām tiek piedēvēta dramatiska kvalitāte. J.Banks, kurš vada Sensoro Labirinta teātri (Sensory Labyrinth Theater), teātri definē kā “kopīgu brīdi telpā un laikā” nevis to, ko ar šo terminu parasti var saistīt (Banks, 2019).

Autore J. Šmite, iepazīstot sensorā labirinta teātri kursus Itālijā, Ligoonchio (Erasmus+ projekts “Beyond visible” 2021.gada novembrī), (Rīgas Juglas vidusskola, 2021) uzskata, ka Sensorā labirinta teātra metode ir viena no arvien plašāk izmantotajām metodēm savu maņu apzināšanai, kuru iespējams pielietot visdažādākajās dzīves jomās, tai skaitā mācību stundās skolā. Savu maņu atpazīšana un izpratne var būt visai sarežģīta un kā liela daļa dzīves ieradumu, ar laiku mūsu spēja atpazīt, kontrolēt un sadzīvot ar savām maņām noteikti uzlabosies. Galvenais ir iemācīties ieklausīties iekšējā balsī un atpazīt savas sajūtas un maņas. Katram ir iespēja tās mainīt, vienkārši paskatīties uz situāciju no citas puses un sākt darīt to, ko agrāk nekad nav darījis. Sensorais labirinta teātris palīdz labāk izprast savas maņas, kā arī labāk saprast un pieņemt atšķirīgo.



1. attēls. *Pedagoģiskā teātra metodes elementi* (Autoru veidots)  
Figure 1 *Elements of the Pedagogical Theater Method* (Author's design)

Skolēni var radošāk izpausties, ļauties emocijām un sajūtām. Šī metode (1.att.) piektklasniekiem ir piemērots veids, kā atgriezties bērnībā, atkal izjust spēlēšanās prieku. Ar šīs metodes palīdzību skolēni pārvar sevī barjeras. Darbojoties grupās pieņem otru un iepazīst viņu cita gaismā. Ar teātra metodi skolēni apgūst ķermeņa plastikas pārvaldīšanu: stāju, gaitu, kustības, pozas, žestus, mīmiku, kā arī mutvārdu runas tehnikas pārvaldīšanu: intonāciju, elpošanu, dikciju, balsis raidīšanu, tēlošanu ar balsi, runas melodiju. Šī metode trenē orientēšanos fiziskajā telpā, ka arī skaņu telpā.

Skolotāji izmanto teātra metodi darbā ar skolēniem viņu motivācijas paaugstināšanai apgūt jaunas zināšanas un pielietot savas prasmes aktīvi un radoši, darbojoties savas izglītības procesā. Pedagoģiskā teātra pamats, lomu spēles ietvaros, ir iespēja būt jebkurā laikā un vietā. Tas dod brīvību realitātes izteikšanai. Izglītības programmas saturs, pielietojot teātra metodi ļauj skolēniem mijiedarboties atbrīvotākā atmosfērā, kas iekļauj jautrības un izklaides elementus un ir veiksmīgi izmantojams karjeras izglītībā pamatskolā.

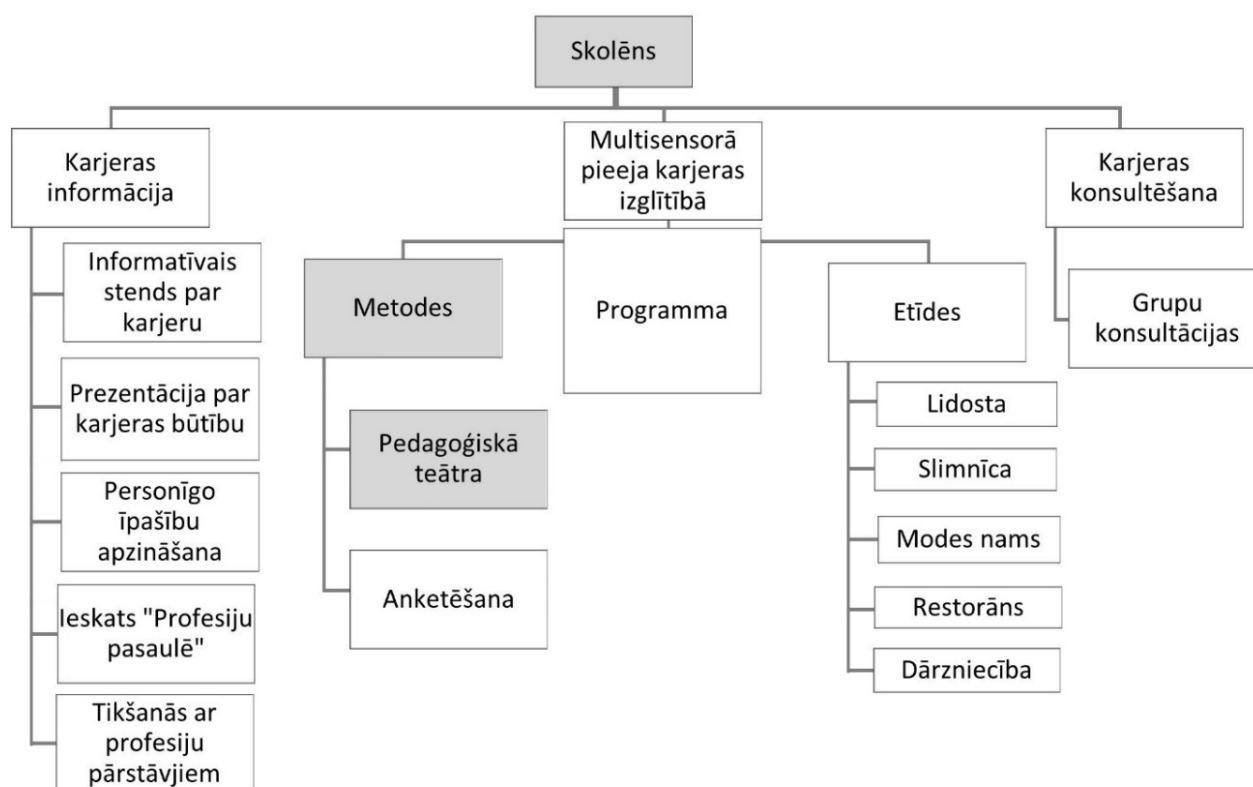
### **Multisensorās pieejas shēma, izmantojot teātra metodi**

Ir dažādas stratēģijas, kuras skolotāji un karjeras konsultanti var izmantot, lai palīdzētu skolēniem apgūt karjeras izglītības tēmas. Multisensoro pieeju var izmantot kā stratēģiju, izstrādājot etīdes saistībā ar dažādām profesijām, lai uzlabotu skolēnu informētību un apzinātību par karjeras iespējām. Etīdēs izmantotā pedagoģiskā teātra metode iesaista skolēnu vizuālo, dzirdes, garšas, ožas un taustes izmantošanu klasē, lai rastu priekšstatu par dažādās profesijās izmantoto sensoriku.

Šī shēma (2.att.) atspoguļo darbības jomas, ar kuru palīdzību darbs ar skolēniem būs efektīvāks. Shēma sastāv no trīs sadaļām: *Karjeras informācija*, *Karjeras konsultēšana* un *Multisensorā pieeja karjeras izglītībā*. Skolēni saņem informāciju par karjeru dažādos veidos no: informatīvā stenda par karjeru; prezentācijas par karjeras būtību; personīgo īpašību apzināšanas, ieskata "Profesiju pasaulē" (VIAA, 2022) - interaktīvs materiāls internetā; tikšanās ar profesiju pārstāvjiem - vismaz reizi mēnesī.

Aprobācijas rezultātā Multisensora pieeja karjeras izglītībā 5. klašu skolēniem tika realizēta ar pedagoģiskā teātra metodes palīdzību, izspēlējot multisensorās etīdes par profesijām. Pirms un pēc tām skolēni tika anketēti, lai noskaidrotu, vai, izmantojot maņas un piedaloties etīdēs, pedagoģiskā teātra metode bija piemērota, lai skolēni iepazītos ar profesiju, paši darbojoties kā profesijas pārstāvji. Uzmanība tika pievērsta katram skolēnam, lai viņam lomu spēle izdotos, un tas veicinātu izdarīt pareizāku izvēli par savu nākotnes profesiju.

Karjeras konsultēšana notika grupās, kur skolēniem diskusijas veidā bija iespēja noskaidrot dažādus ar karjeru saistītus jautājumus.



2.attēls. Multisensorās pieejas shēma karjeras izglītībā 5. klasei, izmantojot pedagoģiskā teātra metodi (Autoru veidots)

Figure 2 The Scheme of Multisensory Approach in Career Education for 5th Grade, Using the Pedagogical Theater method (Author's design)

Pētījuma ietvaros skolēni sadalīti grupās izspēlēja piecas etīdes *Lidosta*, *Slimnīca*, *Modes nams*, *Restorāns* un *Dārzniecība*.

### **Multisensorās etīdes piemērs “Lidosta”**

**Nepieciešamie līdzekļi:** papīrs, pildspalva, soma, pudele ar ūdeni, kabatlakatiņu paciņa, grāmata, auglis, zīmulis, atslēga, telefona lādētājs, telefons, maza ūdens pudelīte, metāla nagu vīlīte, saliekams nazītis acu aizsegi. Etīdes saturs uzdevumā *Lidosta* (1.tab).

Visas multisensorās etīdes, izmantojot teātra metodi, tika izspēlētas klašu telpās, skolēniem ierastā vidē. Pirms katras nodarbības klases telpā tika izvietoti visi multisensorajās etīdēs nepieciešamie materiāli uz skolēnu soliem. Pirms etīžu izspēles tika izskaidrota nodarbības gaita, mērķi, uzdevumi un sasniedzamie rezultāti. Pirms un pēc etīdes izspēlēšanas, izmantojot teātra metodi, skolēni veica savu maņu (redze, dzirde, tauste, oža vai garša) apzināšanās pašvērtējumu. Atbildes tika vērtētas skalā no 1 līdz 4 ballēm, kur 1 ir viszemākais vērtējums, bet 4 – visaugstākais. Maņu apzināšanās notika, lasot etīdes uzdevumus, sarunājoties ar pasažieri, aptaustot priekšmetus, aptaustot pasažieri, kā arī smaržojot atrastos neatļautos šķidrumus.

*1. tabula Izspēlē etīdi Lidostā, izmantojot teātra metodi! (Autoru veidots)  
Table 1 Act out etude at the Airport using the Theater Method! (Author's design)*

N.p.k.	Tu esi lidostā darbinieks. Lidostā ierodas pasažieris ar kuru tev:		
1	Jāsasveicinās un jāpajautā, uz kuru valsti viņš dodas.	4	Tev jāmeklē neatļauti priekšmeti, kas ir pasažierim kabatā.
2	Tev jāpalūdz pasažierim parādīt somu. Tu pārbaudi viņa somu ar aizsegtām acīm, ņemot ārā katru priekšmetu un skaļi to nosaucot. (Acu aizsegi jālieto tikai pārbaudot somu).	5	Atrastie šķidrums jāpasmaržo.
3	Tu pārmeklē pasažieri. Lūdz, lai viņš paceļ rokas plecu platumā un aptausti viņu.	6	Tu novēli pasažierim jauku lidojumu un atvadies.

Multisensoro etīžu saturs ir piemērots, lai uzsvērtu katra skolēna individualitāti un palīdzētu izprast katram savas īpaši attīstītās maņas, kuras attiecīgi var izmantot atbilstošās profesijas izvēlē. Multisensoro etīžu apraksti pieejami šī gada iepriekšējā pētījuma aprakstā (Šmite, Dišlere, 2023, p. 177, 178). Skolēni ar multisensoro etīžu izspēles palīdzību tiek iedrošināti netradicionālu uzdevumu veikšanai.

*2. tabula. Statistiskie rādītāji par maņu izmantošanu, izmantojot pedagoģiskā teātra metodi, pirms un pēc multisensoro etīžu par profesijām izspēlēšanas (Autoru veidots)  
Table 2 The Statistical Indicators of the use of senses before and after acting out multisensory essays about professions using the pedagogical theatre method (Author's design)*

Nr	Apzināšanās par maņām, pielietojot pedagoģiskā teātra metodi, etīdēs	Vērtējums (1 -4 balles)									
		Lidosta		Slimnīca		Restorāns		Modes nams		Dārzniecība	
	Aprakstošie statistikas rādītāji	Pirms	Pēc	Pirms	Pēc	Pirms	Pēc	Pirms	Pēc	Pirms	Pēc
1.	Min	1	3	1	3	1	3	1	3	1	3
2.	Max	4	4	4	4	4	4	3	4	2	4
3.	A	3	1	3	1	3	1	2	1	1	1
4.	Me	2	4	2	4	2	4	1	4	1	4
5.	Mo	2	4	2	4	2	4	1	4	1	4
6.	Σ	85	147	138	153	80	133	88	148	101	146
7.	Kopvērtējuma koeficients	0,02	0,76	0,52	0,88	0,01	0,22	0	0,69	0,42	0,64

*n=24*

Analizējot apkopotos datus (2.tab.), autore salīdzina katras multisensorās etīdes vērtējumā visbiežāk (Mo) un vidējo (Me) sastopamās mainīgās vērtības

pirms un pēc to izspēles, visu vērtību izmaiņas ir pozitīvas visos gadījumos. Salīdzinot katras karjeras multisensorās etīdes vērtējuma summas ( $\Sigma$ ), var secināt, ka visos gadījumos ir notikušas izmaiņas – summas ir palielinājušās amplitūdā no 15 etīdē *Slimnīca* līdz 62 etīdē *Lidosta*. Pozitīvo tendenci apliecina arī kopvērtējumu koeficientu analīze – tie ir palielinājušies amplitūdā no 0,21 līdz 0,74. Vislielākās pozitīvās izmaiņas notikušas multisensorās etīdes *Lidosta* vērtējumā (0,74) un vismazākās – multisensorās etīdes *Restorāns* vērtējumā (0,21). Pirms etīdēm skolēni nebija īpaši pievērsuši uzmanību savām maņām, bet pielietojot teātra metodi un izspēlējot etīdes, akcentējot visas piecas maņas, skolēni tās apzinājās, daudz labāk atpazīna, kur tās tiek izmantotas.

Multisensorās pieejas jēdziens izglītībā ir plaši atzīts pedagoģijas jomā. Šo koncepciju var attiecināt uz karjeras izglītību skolās, lai palīdzētu skolēniem labāk izprast un atcerēties ar karjeru saistīto informāciju savas potenciālās karjeras attīstībai. Pedagoģiskā teātra metode (1.att.) organiski iekļaujas Multisensorās pieejas realizācijas shēmā karjeras izglītībā 5.klasei (2.att.). Karjeras konsultanta darbs visos trijos virzienos, kas atspoguļoti shēmā – informējot, izglītojot un konsultējot, dod iespēju palīdzēt skolēniem apzināties savas spējas, palūkoties uz karjeras iespējām neierastā veidā, izmantojot savas maņas, attīstot zinātkāri, piedaloties teatrālos uzdevumos, un iepazīties ar jauniem karjeras avotiem.

Multisensorā pieeja ir gan izglītojoša, gan terapeitiska metode, kas iesaista vairākas maņas (piemēram, redzi, skaņu, tausti, garšu un smaržu). Tā paredzēta, lai uzlabotu mācīšanos, atmiņu un vispārējo pieredzi. Stimulējot vairākas maņas vienlaikus, informācija tiek apstrādāta un saglabāta efektīvāk, tādējādi radot dziļākus un noturīgākus mācību rezultātus.

Teātra metode ir ļoti piemērota šim vecumposmam, jo skolēni visus uzdevumus veica ar prieku. Skolēni darbojoties pāros, vai grupās izturējās viens pret otru iejūtīgi. Ja kāds netika ar kādu uzdevumu galā, viens otram labprāt palīdzēja.

## **Secinājumi** **Conclusions**

Karjeras izglītības plānošana un īstenošana skolās ir atkarīga no katras skolas ieinteresētības, un no tā ir vai nav skolā karjeras konsultants.

Pedagoģiskā teātra metode attīsta prasmi pielietot maņas, izmantojot reālās dzīves pieredzi, tā paplašinot iespējas sevis izzināšanā un potenciālās nākotnes karjeras izvēlē. Karjeras konsultantam, īstenojot karjeras izglītību 5. klasē, vadot karjeras aktivitātes, piemēram, etīdes par profesijām, un, izmantojot teātra metodi multisensorās pieejas ietvaros, iespējams karjeras informāciju labāk novadīt līdz skolēniem, jo tiek izmantotas dažādas reprezentatīvās sistēmas, kuras atbilst viņu modalitātēm - redzei, dzirdei, garšai, ožai vai tausti. Multisensorā pieeja, kad tiek stimulētas vairākas maņas vienlaikus, metodiski izmantojot mērķtiecīgi

sagatavotos uzdevumus, tiek veicināta skolēnu maņu apzinātības attīstība, ko var izmantot karjeras izglītībā un turpmākās profesijas izvēlē.

Aprobējot karjeras izglītības īstenošanu pamatskolā 5.klasēm, balstoties uz multisensoro pieeju, izmantojot pedagoģiskā teātra metodi un izspēlējot etīdes, pētījumu rezultāti pierāda, ka ir notikusi skolēnu maņu apzinātības attīstība un tas ir noderīgi turpmākās karjeras izvēlē. Skolēniem patika darboties neparastās situācijās. Skolēni ar interesi un rūpīgi izpildīja multisensoro etīžu uzdevumus, aktīvi iesaistījās pāru dialogos, visvairāk skolēniem ir patikusi etīde *Lidosta*.

Pedagoģiskā teātra metode ir piemērota karjeras izglītības īstenošanai darbā ar skolēniem, autores iesaka to izmantot arī citās skolās.

### Summary

The role of parents in choosing a child's education and career direction is very important, but the school complements it and helps students develop their abilities and talents. This study is dedicated to supplementing methodological materials in career education in elementary school. The study aims to theoretically explore the Pedagogical Theatre Method, to develop a Multisensory Approach Scheme using the Theatre Method to promote the development of pupil's sensory awareness in career education in Grade 5. They were developed based on the studies of scientific literature and the work experience of both authors. The study was developed in the Latvia University of Life Sciences and Technology, the Institute of Education and Home Economics within the Master study programme Career Counsellor. Twenty-four students were involved in the study from Riga Jugla Secondary School Grade 5. The surveys were conducted in 2023. The Pedagogical Theater were used by teachers, acting in career education classes with students both individually and in groups, preparing tasks - etudes, so that the student can assume the role of representatives of various professions, freely figuring out how to act to perform the task using the senses (sight, hearing, touch, taste, sense of smell). The Pedagogical Theater Method is characterized by vigorous activity, unlimited use of means of expression, free expression of emotions, language improvisation, body movement and the involvement of entertainment elements. The use of the Theater Method contributes to the development of students' sensory awareness, personal growth, development of social awareness, instigation of changes and clarification of career-related issues. The Pedagogical Theater Method (Fig. 1) organically fits into the implementation the Scheme of the Multisensory Approach in Career Education for the 5th Grade (Fig. 2), it is suitable for elementary school students. The career counselor's work in all three directions reflected in the scheme - informing, educating and advising, will give the opportunity to help students realize their abilities, look at career opportunities in an unusual way, using their senses, develop curiosity, participate



in theatrical tasks, and get acquainted with new career sources. Results of the study could be used in the work of school teachers and school career counsellors.

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# LEARNING LOSSES AMONG STUDENTS OF GENERAL SECONDARY SCHOOLS IN UKRAINE AS A CONSEQUENCE OF UNPREDICTABLE GLOBAL CHALLENGES: CHALLENGES AND PERSPECTIVES

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**Abstract.** *In the context of a full-scale war in Ukraine launched by Russia on February 24, 2022, Ukraine's educational system in general and the system of general secondary education in particular faced previously unforeseen challenges in organising educational process under martial law. These challenges lead to the emergence of previously unpredictable problems in the system of general secondary education that require systemic and purposeful solutions. One of these problems is directly related to learning losses among students of general secondary education and the search for effective ways of compensating for these learning losses. And although learning losses have become an objective reality at all levels of education, this issue is especially true in general secondary education institutions, as school-age children are the most vulnerable in the context of the tragic events taking place in Ukraine due to the war. Taking into account the fact that this topic has not been systematically studied in the scientific literature, the present paper is aimed at identifying war-related learning losses based on the experience of Ukrainian general secondary school teachers. The data collection instrument includes a questionnaire developed by the authors of this paper and the research sample includes 352 general secondary school teachers.*

**Keywords:** *Covid-19 pandemic, general secondary schools, general secondary school teachers, learning losses, students of general secondary schools, system of general secondary education, unpredictable global challenges, war conflicts, war in Ukraine.*

## Introduction

Unpredictable global challenges of the 21<sup>st</sup> century have already had adverse effects on the systems of education all over the world resulted in learning losses

among secondary school students. But, in the context of a full-scale war in Ukraine launched by Russia on February 24, 2022, Ukraine's educational system in general and the system of general secondary education in particular faced previously unforeseen challenges in organising educational process under martial law that led to the emergence of previously unpredictable problems in the system of general secondary education. And these problems require systemic and purposeful solutions. One of these problems is directly related to learning losses among secondary school students and the search for effective ways of compensating for these learning losses. And although learning losses have become an objective reality at all levels of education, this issue is especially true in general secondary education institutions, as school-age children are the most vulnerable in the context of the tragic events taking place in Ukraine due to the war.

According to the United Nations Children's Fund (2022), along with problems with children's mental health, malnutrition and a high level of abuse, grave consequences for general secondary education worldwide caused by the Covid-19 pandemic include learning losses. As of 24 January 2022, more than 616 million students worldwide remained affected by full or partial school closures (The United Nations Children's Fund [UNICEF], 2022) and these school closures led to the decrease in students' ability to read and do simple mathematics, on the one hand, and the increase of anxiety and depression among children, on the other hand. And in the nearest future it is believed that learning losses caused by the Covid-19 pandemic will affect the welfare and the quality of life of our young generation (UNICEF, 2021).

The statistics given by "The New York Times" (2023) shows that 50 million schoolchildren were out of the classrooms due to the Covid-19 pandemic and such school closures set the progress of school-age children in mathematics and reading back by two decades. One more serious problem that requires an urgent solution concerns the increase in student absenteeism. During the Covid-19 pandemic many schoolchildren got used to missing classes and they continue missing classes after the resumption of in-person classes (The New York Times, 2023). School absenteeism leads to both socialisation problems and high increase in school dropouts.

We are in full agreement with many researchers who state that before the Covid-19 pandemic, various forms of learning losses were mostly associated with summer vacations (Hevia, Vergara-Lope, Velásquez-Durán, & Calderón, 2022; Kuhfeld, 2019). But the Covid-19 pandemic made its own adjustments and learning losses started to be associated with the widespread closures of schools all over the world and the inability to organise a full-fledge educational process. Thus, for instance, in trying to figure out the effects of the Covid-19 pandemic on the system of general secondary education in Mexico, Hevia, Vergara-Lope, Velásquez-Durán, & Calderón (2022) identified learning loss in reading and

numeracy, an increase in learning poverty and gaps in fundamental learning by gender.

In Ukraine the situation with learning losses among school-age children goes beyond the standard one and this situation is unfortunately getting worse. It is connected with the fact that Ukrainian schoolchildren have been facing an unprecedented and devastating disruption of education for about four years caused by the Covid-19 pandemic and then by the full-scale war launched by Russia against Ukraine on the 22<sup>nd</sup> of February 2022 (UNICEF, 2023). The things are getting more and more complicated also because all Ukrainian school-age children find themselves in completely different circumstances which directly influence their studying. Existing research shows that nowadays all Ukrainian schoolchildren can be divided into following groups, namely, "... (1) school-age children who stayed at home in the same living conditions which they had before the war started; (2) internally displaced school-age children; (3) refuge- or asylum-seeking children; (4) forcibly displaced children; (5) children who remain in the war-affected areas" (Malykhin, Aristova, & Bondarchuk, 2022, p. 187). Such a situation makes it difficult to take quick actions aimed at minimising learning losses among Ukrainian schoolchildren. Moreover, adequate actions which have to be taken to minimise learning losses should be based on understanding the total picture of the magnitude of learning losses among schoolchildren and should take into consideration opinions of various participants of educational process, namely, schoolchildren, parents, teachers and representatives of school administrations etc. We do believe that the problem of minimising learning losses among Ukrainian schoolchildren requires prompt scientific understanding and complex search for the most optimal ways and means of solving it. In this regard, the present paper is aimed at identifying war-related learning losses based on the experience of Ukrainian general secondary school teachers.

### **Learning Losses, Learning Gaps and Learning Poverty**

Literature analysis shows that there is no uniform definition of the concept of "learning loss" and it is often associated with such concepts as "learning gap" and "learning poverty". To be more precise, learning gaps and learning poverty are considered to be the main reasons for learning losses. In this regard it should be noted that the concept of "learning poverty" is relatively a new phenomenon which was coined by the World Bank and the UNESCO Institute for Statistics in 2019 (World Bank, 2019). It is defined as an inability "to read and understand a simple text by age 10" (World Bank, 2019, p. 6). It means that in order to learn well and succeed in the future, all children should have good reading skills by age 10 (World Bank, 2019; World Bank, 2021). In many cases the lack of reading skills among schoolchildren becomes "a clear indication that school systems

aren't well organized to help children learn in other areas such as math, science, and the humanities" (World Bank, 2021).

As for such a concept as "learning gap", it is considered as "... a discrepancy between what a student has learned and what a student was expected to learn by a specific point in their education" (Welcome, 2021). The researcher identifies five main types of learning gaps, namely, knowledge gaps, skill gaps, motivation gaps, environment gaps and communication gaps (Welcome, 2021).

"The Glossary of Education Reform" (2013) defines the concept of "learning loss" in two ways. Thus, according to the first definition, a learning loss is regarded as "any specific or general loss of knowledge and skills" (The Glossary of Education Reform, 2013). The second definition regards learning losses as "reversals in academic progress, most commonly due to extended gaps or discontinuities in a student's education" (The Glossary of Education Reform, 2013). The most typical reasons for leaning losses include summer breaks, interrupted formal education, returning dropouts, senior year, school absence, ineffective teaching and block scheduling.

Taking into account the fact that education is foundational for "active participation of individuals and societies in the global economy" (World Bank, 2019, p. 7), learning losses among secondary school students might cause irreparable damage for the global economy in general and for the welfare of any member of the global community in particular in the long run.

## **Research Methodology**

The current research was aimed at identifying war-related learning losses based on the experience of Ukrainian general secondary school teachers. Data collection which lasted for four months took place in September-December 2023. The data collection instrument included a questionnaire developed by the authors of this paper. The developed questionnaire contained open- and close-ended questions. For convenience the researchers used two versions of the questionnaire: a paper-based questionnaire and an online questionnaire. The main research questions were:

*Do you believe that schoolchildren you teach experience learning losses?*

*Do you believe that learning poverty among schoolchildren you teach increased?*

*Do you believe that learning poverty is one of the main reasons for learning losses? Please, explain your point of view.*

*Do you believe that in order to take the right steps to minimise or to compensate for learning losses, teachers have to identify learning losses schoolchildren you teach experience?*

*Please, list learning losses caused by the full-scale war launched by the Russian Federation in Ukraine, which, in your opinion, schoolchildren you teach experience?*

*Which of the learning losses listed by you are extremely difficult to measure? Please, explain your point of view.*

*Which of the learning losses listed by you are extremely difficult to respond?*

*When do you think is the best way to evaluate the magnitude of learning losses among schoolchildren? Please, explain your point of view.*

The researchers used a combination of two techniques to collect data: a convenience sampling technique and a purposive sampling technique. The need to use a purposive sampling technique is explained by the fact that the authors were interested in general secondary school teachers' views on war-related learning losses. And the use of convenience sampling techniques is explained by the fact that the researchers represent Institute of Pedagogy of National Academy of Educational Sciences of Ukraine, they actively cooperate with general secondary educational institutions all over Ukraine and can communicate directly with teachers. As a result, the research sample included 352 general secondary school teachers: 137 primary school teachers (38.92%), 121 middle school teachers (34.38%), 94 high school teachers (26.70%).

To process data the team of researchers used methods of qualitative analysis.

## **Findings**

The first question of our research is “*Do you believe that schoolchildren you teach experience learning losses?*”. The obtained results show that all 352 school teachers (100.00%) believed that schoolchildren they taught experienced learning losses. It means that all the respondents admit that their students suffer learning losses. Moreover, they do realise the seriousness of the situation.

The main aim of the second question was to find out if learning poverty among schoolchildren increased. The results clearly demonstrate that 267 respondents (75.85%) answered affirmatively to this question and 85 respondents (24.15%) found it difficult to answer it.

The third question was aimed at finding out if respondents believed that learning poverty was one of the main reasons for learning losses among Ukrainian schoolchildren. It was found out that 190 respondents (53.98%) were convinced that learning poverty was one of the main reasons for learning losses, 95 respondents (26.99%) stated that they didn't agree that learning poverty was one of the main reasons for learning losses and 67 respondents (19.03%) found it difficult to answer this question. Figure 1 demonstrates the results concerning the respondents' opinions on the third question.

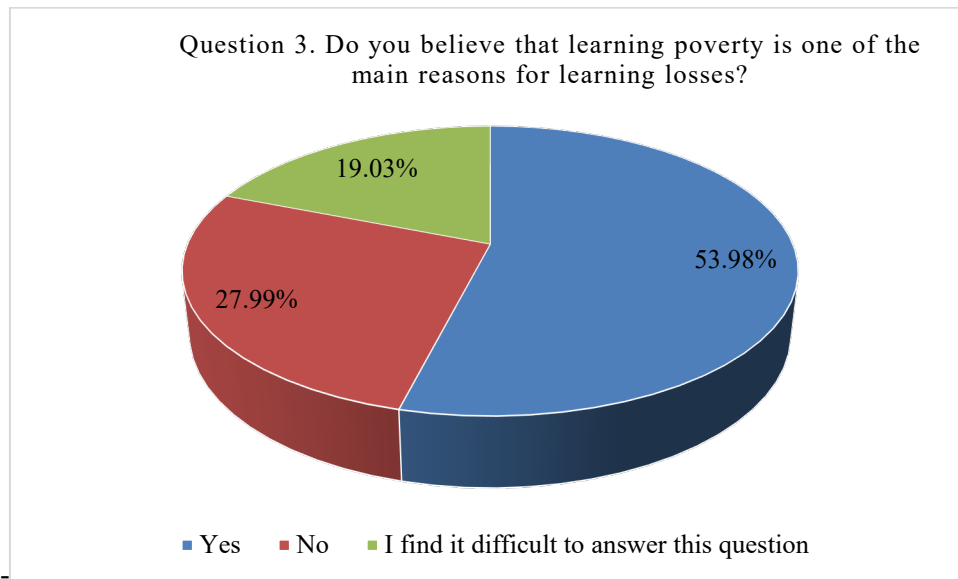


Figure 1 Respondents' Opinions on Question 3 (made by authors)

The fourth question was “Do you believe that in order to take the right steps to minimise or to compensate for learning losses, teachers have to identify learning losses schoolchildren you teach experience?” The results obtained showed that all 352 respondents (100.00%) were united in the idea that in order to take the right steps to minimise or to compensate for learning losses teachers should identify learning losses their students suffered.

In the context of question 5, the respondents were asked to list learning losses their students experienced caused by the full-scale war launched by the Russian Federation in Ukraine. The results obtained are presented in Table 1.

Table 1 Types of Learning Losses Experienced by Ukrainian Schoolchildren by Respondents' Points of View (made by authors)

Types of Learning Losses	Respondents	
	Number	Percent
Losses connected with subject-matter knowledge	197	55.97
Losses connected with socio-emotional skills	279	79.26
Losses connected with brain-based skills (so-called cognitive abilities)	301	85.51
Losses connected with reading skills	164	46.59
Decrease in learning motivation	203	57.67%

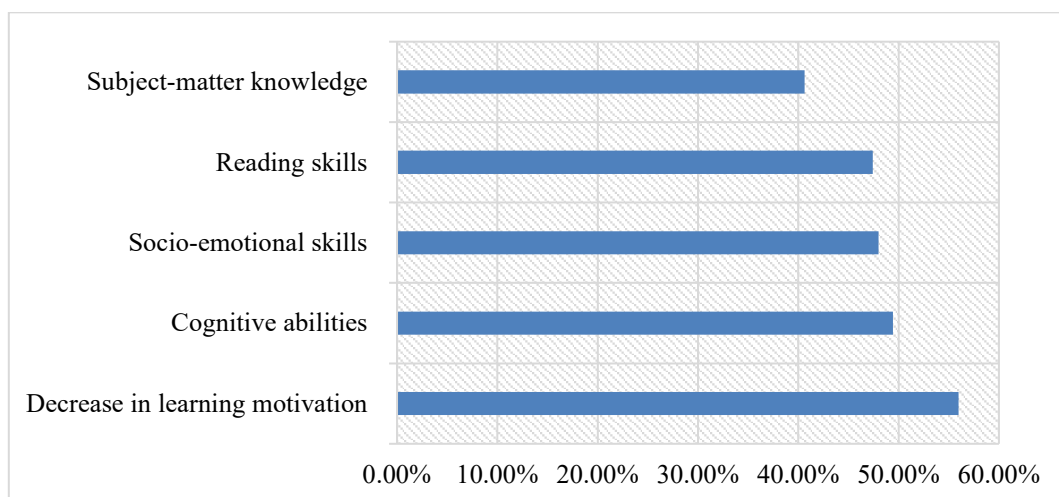
n=352

Question 6 aimed at finding out which of the listed learning losses were extremely difficult to measure. 256 respondents (72.73%) were convinced that it was almost impossible to measure socio-emotional skills effectively. Moreover, in respondents' opinions the lack of a unified classification of socio-emotional



skills made it difficult to determine the most important socio-emotional skills. Taking into account the fact that such a procedure should be complex and should be based on proven inventories the respondents believed that the measurement of soft skills would continue to grow over time. According to 201 respondents (57.10%), brain-based skills were found to be the second most difficult task to measure. Decrease in learning motivation was ranked the third place by 187 respondents (53.13%). The respondents' explanations clearly demonstrated that the process of measuring schoolchildren's brain-based skills and the level of learning motivation would be time-consuming and would require the additional help of psychologists. Subject-matter knowledge was ranked the fourth place by 173 respondents (49.15%) and reading skills were ranked the fifth place by 92 respondents (26.14%). The respondents explained that although some complications connected with measuring subject-matter knowledge and learning poverty could occur, they could be measured during the educational process. The majority of respondents stated that in order to succeed in measuring subject-matter knowledge and learning poverty, measurements should have a systematic and complex character which was difficult to do in times of war.

The sixth question we were interested in was “*Which of the learning losses listed by you are extremely difficult to respond?*” In answering this question, the respondents' opinions were as follows: decrease in learning motivation – 197 respondents (55.97%), brain-based skills – 174 respondents (49.43%), socio-emotional skills – 169 respondents (48.01%), reading skills – 167 respondents (47.44%) and subject-matter knowledge – 143 respondents (40.63%). Figure 2 demonstrates results obtained on question 6.



**Figure 2 Respondents' Views on Types of Learning Losses which are Difficult to Respond**  
(made by authors)

The main aim of question 7 was to find out when was the best way to evaluate the magnitude of learning losses among schoolchildren. 271 respondents (76.99%) suggested that the magnitude of learning losses among schoolchildren should be evaluated at each level of complete general secondary education. According to paragraph 3 of Article 12 of the Law of Ukraine “On Education”, the complete general secondary education consists of three levels, namely, primary education, basic secondary education and specialised secondary education (Verkhovna Rada of Ukraine, 2017). It is worth noting that the mandatory learning outcomes, cross-cutting skills and key competences for lifelong learning which schoolchildren have to acquire at each level of complete general secondary education are identified and described in “The State Standards for General Secondary Education”. “The State Standard for Primary education” (Verkhovna Rada of Ukraine, 2018) and “The State Standard for Basic Secondary Education” (Verkhovna Rada of Ukraine, 2020) were issued and became effective. And “The State Standard for Specialised Secondary Education” is still in development. But nevertheless, specially designed tests for three levels of complete general secondary education based on the “The State Standards for General Secondary Education” should be developed and implemented in the educational process of general secondary institutions and this requires the collaborative efforts of teachers, researchers, school administration, parents, representatives from the Ministry of Education and Science of Ukraine and policy makers. In such a way it would be possible to realise what knowledge and skills school-age children lack. These respondents also stated that in times of war it was practically impossible to evaluate and see the magnitude of learning losses as the full-scale evaluation of the seriousness of the problem would be possible only after the war. It should be also noted that 81 respondents (23.01%) found it difficult to answer this question.

## **Conclusions**

Taking into account the fact that learning losses among general secondary schoolchildren might cause irreparable damage for the global economy in general and for the welfare of any member of the global community in particular in the long run, the current research was aimed at identifying war-related learning losses based on the experience of Ukrainian general secondary school teachers. The obtained results clearly demonstrate that teachers who took part in this research believe that Ukrainian schoolchildren experience learning losses and learning poverty among them increased. It is proved by the fact that 190 respondents (53.98%) are convinced that learning poverty is one of the main reasons for learning losses among Ukrainian schoolchildren. 352 respondents (100.00%) are united in the idea that in order to take the right steps to minimise or to compensate for learning losses teachers should identify learning losses their students suffer.

According to respondents, the main types of learning losses experienced by Ukrainian schoolchildren include losses connected with subject-matter knowledge, losses connected with socio-emotional skills, losses connected with brain-based skills (so-called cognitive abilities), losses connected with reading skills and decrease in learning motivation. In answering this question regarding the learning losses that are extremely difficult to respond, the respondents' opinions are as follows: decrease in learning motivation – 197 respondents (55.97%), brain-based skills – 174 respondents (49.43%), socio-emotional skills – 169 respondents (48.01%), reading skills – 167 respondents (47.44%) and subject-matter knowledge – 143 respondents (40.63%). The majority of respondents (76.99%) do believe that in times of war it is practically impossible to evaluate and see the magnitude of learning losses as the full-scale evaluation of the seriousness of the problem would be possible only after the war. These respondents suggest that the magnitude of learning losses among schoolchildren should be evaluated at each level of complete general secondary education and for this reason specially designed tests for three levels of complete general secondary education based on the “The State Standards for General Secondary Education” should be developed and implemented in the educational process of general secondary institutions.

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## VISUALIZING EDUCATIONAL INFORMATION: PRIMARY SCHOOL TEACHERS' VIEWS

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**Abstract.** *The study's major purpose was to compare primary school teachers' views on visualizing educational information under conditions of the reform of Ukrainian education being in progress and unforeseen global impacts (martial law in Ukraine and the Covid-19 pandemic). The survey was conducted within the time period of 2019 spring – 2022/2023 winter. The total number of respondents consisted of 265 primary school teachers.*

*Gradual primary school teachers' reorientations regarding the essence of visualizing educational information were determined as a strong positive tendency: from the position of its identification associated with the didactic field of the use of visual means to the consideration of visualizing educational information as an effective didactic tool boosting the use of interactive methods of teaching and learning in primary school.*

*A significant rethinking of the didactic potential of using visualization in the educational process of primary school was being observed. The implementation speed of forms, methods and means of information visualization in the educational process of primary school changed positively as a result of experimental didactic influences. But the dynamics of changes was not correspondingly enough to the needs of modern educational requirements. Concluded the inappropriate development of primary school teachers' visualizing educational information skills that are to be intensively improved among primary school teachers.*

**Keywords:** *primary school; primary school teachers; teachers' visualizing skills; visual literacy; visualizing educational information.*

### Introduction

Civilizational changes, technological progress, expansion of the space of innovation activity in all spheres of society determine the expediency and necessity to search for new developmental perspectives in the field of education.

In particular, the improvement of existing ones and the formation of new competencies amid teachers on the way of their professional training and professional activities. As the key result of teachers' education should be regarded sustainable development of their ability and willingness to use their systemic knowledge, skills, abilities and qualities as tools for finding out the most effective solutions of the professional and pedagogical tasks they face.

Achieving this result within the system of primary school teachers' professional training resulted as further development of their professional pedagogical competence implies understanding the importance of the following two major recommendations: (1) the effectiveness of professional and pedagogical education should be constantly being improved and (2) the strategy targeted at implementation competence-oriented/competence-based education amid primary school students is to be realized constantly as a prior pedagogical idea within contemporary class.

One of the educational innovations claimed to serve these pedagogical areas are to be renovated is the development of visual literacy of primary school teachers, their skills in visualizing educational information. The active use of visual content in all spheres of society strongly influence the system of primary education due to the wide capabilities of ICTs for visualization as a component of blended and distance education.

In pedagogy, at the theoretical and methodological level, opportunities for using visualization are actively being developed to enhance learning outcomes, foster critical thinking, creativity, communication skills etc. (Kędra & Źakevičiūtė, 2019; Özsoy & Saribaş, 2021).

Visualization of information in pedagogy is considered as:

- the process of visual representation of information (giving it a visual form),
- the formed visual image.

It should be noted that most modern scientists share the point of view of W. Zimmermann and S. Cunningham' (1991), that visualization is, first of all, the process of forming an image in the mind of an individual and/or bringing it out both by means of creating digital images or video sequences, and without their use.

So, for example, in the studies by Alessandrini & Rosso (2009), Ponnens & Piller (2020), Salunkhe, Kaithathara, Darshan, Gowri & Shabarisha (2022) visualization is defined as the process of creating a thought image of an object in consciousness (according to the mechanisms of visual imagination, visual perception, and visual thinking). Kunjir and Patil (2020) consider visualization as a representation of text content in models, pie charts, graphs, maps etc. for ease of understanding. The interpretation of visualization Nissen (2020) is similar – as a representation of objects, situations, relationships, processes, phenomena or information through diagrams, graphs, images, or similar means. Tufte (2001, p.9)

suggests considering visualization as “a visual demonstration of information in the form of tables, diagrams and graphs”, and Ursyn (2015) – transmitting information using its graphical representation

Derived from understanding visualization as a visual process, Zheng (2008) defines visualization as a method of conveying abstract and concrete ideas through the creation of images, diagrams, or animations and Wen & Wang (2020) define this concept as a data analysis method that focuses on the external representation of abstract or concrete ideas (image, diagram, animation etc.) to help understand the content of expressed information.

Visualization is widely used in modern primary and secondary school educational process (Knoop-van Campen et al., 2024; Schoenherr & Schukajlow, 2023; Supli & Yan, 2023).

The importance of visualization in the professional and pedagogical activity of primary school teachers is determined by the characteristic features of Modern Primary School students (children of the Alpha generation): the visual orientation of their perception, their attention span and the existing phenomenon of clip thinking. It is advisable to pay attention to the “emotional coloring” of visual content that the teacher can use in the lesson. This property of visualization allows using it to motivate students to learn, create an emotionally comfortable educational environment both under conditions of traditional full-time education, and in lessons in the online format.

Taking into the account the importance and value the ideas and statements presented and summarised above the high-speed positive dynamics is observed in the pedagogical field closely connected with the implementation of educational information visualizing into the processes of teaching and learning in primary school.

So, the study’s major purpose was to demonstrate that the implementation speed of forms, methods and means of information visualization in the educational process of primary school changed positively as a result of authors experimented didactic influences within the period of time determined by the beginning of the Covid-19 pandemic and the years followed it.

### **Research Methodology**

In 2019 spring and 2022/2023 winter a questionnaire of primary school teachers was conducted. It was attended by 265 practitioners from 12 regions of Ukraine. The distribution of teachers by class (from 1st to 4th) was 24%, 28%, 25%, 23% accordingly, at the beginning of the study. In the course of devising and executing research initiatives, the team of researchers from Institute of Pedagogy of National Academy of Educational Sciences of Ukraine (Didactics Department) took into account the experience of scientific and pedagogical activity amid the backdrop of unforeseeable global perturbations, including the

Covid-19 pandemic and the imposition of martial law in Ukraine (Topuzov, Malykhin, & Aristova, 2022; Malykhin, Kaupuzs, Aristova, Orska, & Kalvans, 2023).

In the period between questionnaires, a team of scientists conducted a series of webinars and practical classes for teachers on the problems of visualization of educational information. Considerable attention was devoted to the possibilities of visualizing educational information in order to compensate educational losses under conditions of blended and distance learning in the country. Thus, in 2022, within the framework of teacher development courses “Compensation of educational losses in educational institutions under martial law and post-war reconstruction”, a webinar was held on the topic “Distance education in primary schools: visualizations of educational information and ICT tools” (retrieved: <https://youtu.be/P7AKpXDjuDY>). The webinar discussed the modern possibilities of using visualization of educational information and ICT in the context of a remote form of organizing the educational process in primary school. Various aspects of the implementation of interactive interaction between students and teachers in online lessons were shown: the possibility of using an interactive whiteboard for collaboration, digital visual materials, electronic textbooks etc.

Also, from 2019 to 2022, teachers took advanced training courses introduced by the Ministry of education and science of Ukraine as part of the “New Ukrainian school” reform (Ministerstvo osviti i nauki Ukraïni, EdEra & Osvitorija, n.d.). The mandatory component of the program of these courses includes issues of familiarizing teachers with the didactic potential of using forms, methods, techniques and tools for visualizing educational information in primary schools and practical advice on their implementation in the classroom.

### *Instrument and Procedure*

It is for this purpose the team of researchers from Institute of Pedagogy of National Academy of Educational Sciences of Ukraine (Didactics Department) developed a web-based questionnaire using Google Forms.

The key questions of the questionnaire were:

- Do you think it is advisable to develop visual literacy of students in primary school? (Answers: Yes; No; It’s hard to answer)
- In your opinion, visualization of educational information in primary school is, first of all... (Answers: Use of pre-made visual didactic manuals in the classroom; Creation of visual educational material by the teacher directly in the classroom; Creation of visual educational material by students; Other)
- In your opinion, are the concepts of visual thinking and visual-imaginative thinking identical? (Answers: Yes; No; It’s hard to answer). If you believe that the concepts of visual thinking and visual-imaginative thinking are not identical, explain what the difference is.



- What do you see as the benefits of using visualization in the educational process? (Answers: In the development of cognitive processes; In increasing students' motivation to learn; In improving the assimilation of educational material (accessibility, clarity of its presentation and integrity of perception); In facilitating the formation of students' skills; In intensifying the educational process; In improving discipline in the classroom)

In connection with the global trend of digitalization of education, a question on the introduction/use of digital visualization in the educational process of primary schools was added to the questionnaire:

- Is your classroom equipped with digital learning equipment (computer, multimedia whiteboard etc.)? (Answers: Yes; No)
- Do you have any difficulties with the use of modern ICTs in the development/use of digital content? (Answers: Yes; No)
- How often do you use traditional visual means (illustrations, drawings, diagrams, tables etc.) and modern visual means (presentations, smart maps, interactive images, animations, videos etc.) in your lessons? (Answers: Constantly; Several times a week; Rarely; Never)

In the Ukrainian education system, before the introduction of the “New Ukrainian school” reform, visualization was the least used in the language and literary lessons. In this regard, the questionnaire included questions:

- How often do you use visualization of educational information in language and literature lessons? (Answers: Weekly or more often; Several times a month or less; Never)
- Evaluate the level of providing the language and literary industry with visual didactic material on a 10-point scale
- How often do you use pre-made visual educational materials in your language and literature classes? (Answers: Weekly or more often; Several times a month or less; Never)
- How often do your students create illustrations, diagrams, tables, smart maps, diagrams etc. in language and literature classes? (Answers: Weekly or more often; Several times a month or less; Never)
- How often do you use graphical analyzers (t-diagram, Yes-No ratio scale, diagrams (Venn diagram, cyclic diagram, tree diagram, Fishbone diagram etc.) in your language and literature lessons? (Answers: Weekly or more often; Several times a month or less; Never)

### *Data Analysis*

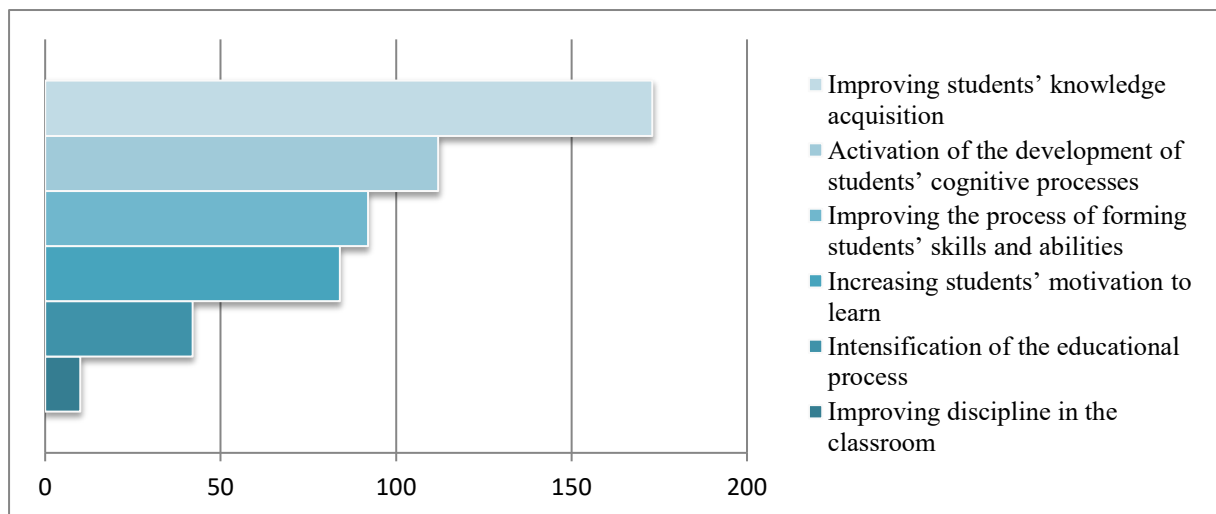
As can be seen from the above, the vast majority of questions in the questionnaire are closed. The quantitative and qualitative data analysis involved a thorough compilation of the information gathered. This process included

presenting the processed data through pie charts, bar charts comparing and summarizing the information, and engaging in discussions to share the findings with the academic community.

### Results and Discussion

According to the results of the 2019 survey, the overwhelming majority of teachers (98.9%) noted the expediency of forming visual literacy of students in primary schools and, at the same time, preferred to use visualization of educational information in lessons as a means (64.7%), rather than a method (33.2%) of teaching. This indicates that the majority of teachers does not fully understand the essence of visualization as a component of the modern educational process, and actually identify it with the use of visual means.

The survey also revealed that primary school teachers lack awareness of the psychological basis for implementing/using visualization in pedagogy. For example, the majority of respondents (75.9%) identify the concepts of visual and visual-imaginative thinking, and among respondents who separate these concepts, less than 4.8% clearly understand the difference between them. As a result, a significant percentage of primary school teachers do not realize all the benefits of using visualization of educational information in the educational process (Fig. 1).



*Figure 1 The point of view of primary school teachers regarding the function of visualization in the educational process (teachers' vision)*

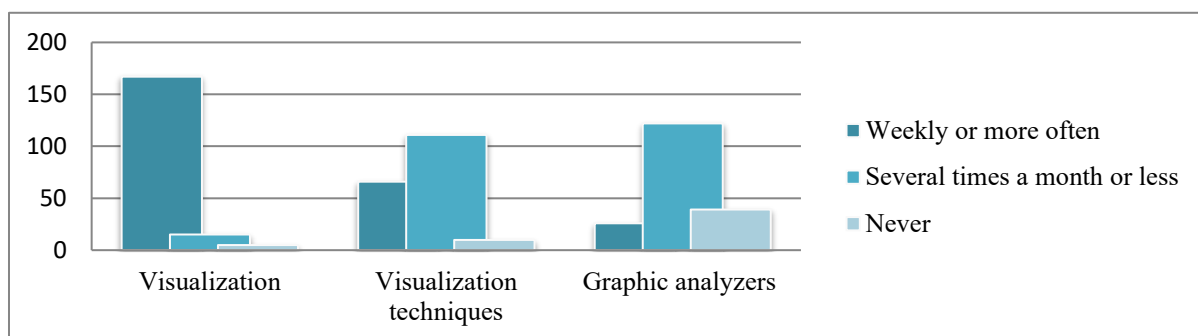
*Source: own elaboration on the basis of data obtained during research*

According to the results obtained, the vast majority of teachers note the importance of visualization in mastering the knowledge component of subject competencies (92.5%). However, its significant impact on the formation of students' skills and abilities was noted by only half of the respondents (49.2%). This can be explained by the existing stereotype of identifying visualization and

illustration (the perception of visualization only as a means of passive learning). A lack of understanding of the benefits of using visualization to intensify the learning process and improve classroom organization and behavior most likely indicates a lack of understanding of the links between:

- activation of students' cognitive interest → increasing students' motivation to learn → improving discipline in the classroom;
- increasing the assimilation of knowledge by students + improving the process of forming students' skills → intensifying the educational process.

Concretizing the issue of using visualization within individual academic subjects, attention was focused on the language and literary field, because in domestic education it was traditionally characterized by a simplified approach to the use of visualization: in the lessons of teaching literacy, literary reading, as well as native and foreign languages in primary school, illustrative visual materials are mainly used. Significant efforts were made to address this gap during the implementation of the 2018 education reform. The requirements for visual literacy of students in the context of language and literary education have acquired a new meaning. At the same time, according to the results of the survey, although the vast majority of primary school teachers (89.3%) constantly use visualization in the educational process, in literacy, language learning and literary reading lessons. The use of pre-prepared visual content, that is, classical visual means, prevails. Only about a third of teachers (35.3%) prefer visualization techniques in learning activities. In particular, graphic analyzers proposed in the methodological recommendations of the New Ukrainian School are actively used by 13.9% of the surveyed teachers (Fig. 2).

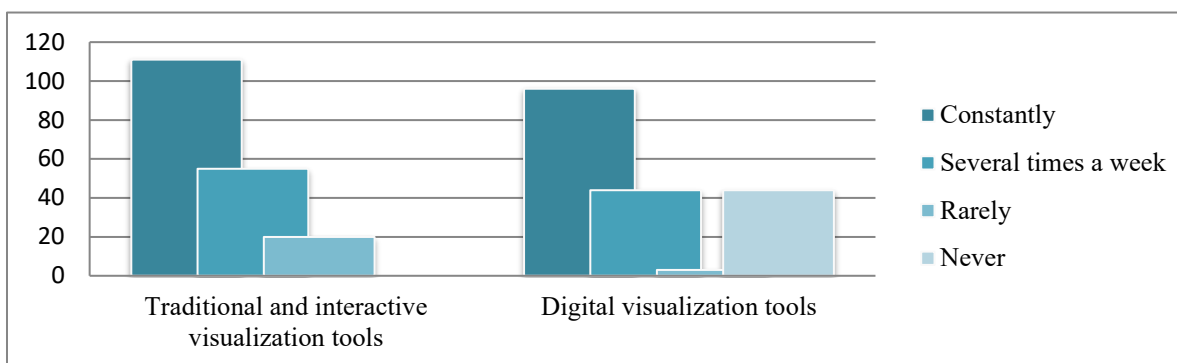


**Figure 2** *Frequency of visualization usage at the lessons of the language and literary field*  
 Source: own elaboration on the basis of data obtained during research.

The situation under consideration determines the request of teachers to expand the variability of available educational visual content. Teachers note insufficient provision of subjects in the language and literature field with visualization tools: 33.7% of respondents indicated a low level, 46.5% of

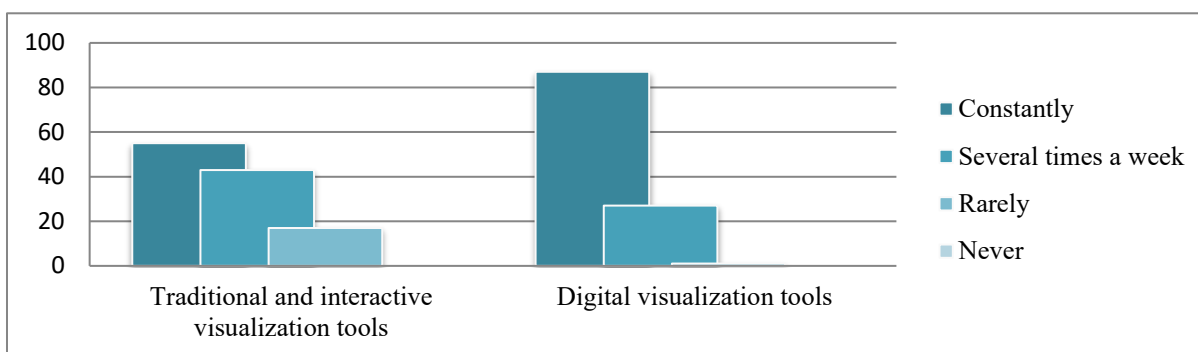
respondents indicated an average level, and only 19.8% of respondents indicated a high level of provision.

We focus on the rapid global penetration of digital technologies into the educational process (caused by the rapid development of information and communication technologies), the available opportunities for their use in training and the actualization of the problem of implementing distance learning in Ukraine. According to the study, about 70% of primary school classrooms are equipped with the necessary informational and communicational equipment, and almost 100% of teachers in these classes use digital visualization tools in the educational process. However, it is worth noting that even teachers of non-equipped classes try to provide a modern level of learning by including elements of digital visualization in independent learning of students (Fig. 3).



*Figure 3 Correlation in the use of traditional and modern visibility*  
 Source: own elaboration on the basis of data obtained during research.

In classrooms that are equipped with modern digital equipment, teachers use both traditional and digital visualization tools (Fig. 4).



*Figure 4 Correlation in the use of traditional and modern visibility by teachers in classrooms equipped with modern digital equipment*  
 Source: own elaboration on the basis of data obtained during research.

According to the frequency of use of face-to-face lessons, digital visualization prevails. It cannot be considered as a positive trend, because, according to the principle of visibility, in primary education it is important to use traditional teaching means (objects, phenomena of the surrounding world and demonstration of ways of acting with them (or material models of the above), which have a sensory-figurative effect on the student's consciousness.

Summarizing the results of the 2019 survey, we note the existence of a stereotype among primary school teachers in associating the visualization of educational information with the use of visual means, particularly its digital variant, within the teaching community. There is a superficial awareness among educators regarding the psychological and pedagogical foundation, as well as the didactic potential of visualization in the educational process. However, we note the absence of implementation of visualization methods in the teaching and cognitive activities within the scope defined by the New Ukrainian School Concept (Ministerstvo osviti i nauki Ukraïni, EdEra & Osvitorij, n. d.). These indicate a relatively low level of visualization skills in the majority of primary school teachers.

At the end of 2022, a second survey of primary school teachers was conducted to find out the dynamics of the implementation/use of visualization in the educational process of grades 1-4 from 2019 to 2022. A comparative analysis of the results of the 2019 and 2022 surveys on key issues is given in Table 1.

*Table 1 Comparative analysis of results of the survey of primary school teachers in 2019 and 2022 (compiled by Authors)*

Survey	2019	2022	Dynamics
The essence of educational information visualization in primary education:			
Teachers who identify the visualization of educational information with using of visual means	64.7%	56.3%	- 8.4%
Teachers who define visualization primarily as a teaching method	33.2%	37.9%	+ 4.7%
Primary school teachers' point of view on visualization functions in the educational process			
Improving students' knowledge acquisition	92.5%	88.5%	- 4%
Activation of the development of students' cognitive processes	59.9%	85.9%	+ 26%
Improving the process of developing students' skills and abilities	49.2%	82.1%	+ 32.9%
Increasing students' motivation to learn	44.9%	79.5%	+ 34.6%
Intensification of the educational process	22.5%	85.9%	+ 63.4%
Frequency of using visualization methods in the educational process (on the example of the language and literature field)			
Weekly or more often	35.3%	39.7%	+ 4.4%
Several times a month or less	59.3%	52.6%	- 6.7%
Never	5.4%	7.7%	+ 2.3%

In general, we observe a gradual reorientation among teachers in defining the essence of visualizing educational information: shifting from considering it as synonymous with the use of visual means to viewing it as an interactive teaching method. There is also a significant reevaluation by teachers of the didactic potential of using visualization in the educational process of primary school.

At the same time, the dynamics of implementing/using visualization in the educational process are positive but not as rapid. Primarily it indicates insufficient development of visualization skills among primary school teachers. In particular, around 40% of respondents face difficulties in transforming textual educational information into a visual form. Additionally, we observe limitations and uniformity in the digital resources used in modern pedagogical practices in primary schools. The most commonly used ones are kahoot.com and padlet.com, also teachers often use liveworksheets.com, mindmeister.com, wordart.com and rebus1.com.

### **Recommendations and Conclusions**

Primary school teachers are increasingly shifting their focus towards recognizing the significance of visualizing educational information. This positive trend involves transitioning from merely identifying it within the didactic realm of visual means to acknowledging visualizing educational information as a potent didactic tool. This shift encourages the adoption of interactive teaching and learning methods in primary schools.

There was a notable reconsideration of the didactic possibilities associated with employing visualization in the primary school educational process. The rate at which forms, methods, and means for visualizing information were integrated into primary school education showed the improvement due to the experimental didactic influences. However, the pace of these changes did not adequately align with the demands of contemporary educational standards. It was deduced that there is insufficient progress in the development of primary school teachers' skills in visualizing educational information. There is a pressing need for intensive enhancement in this area.

Therefore, based on the results of the conducted study, we affirm the relevance of emphasizing the aspect of visualizing educational information in the training of future primary school teachers in higher education pedagogical institutions. It is also necessary to focus the attention of the pedagogical community on purposefully forming and developing the relevant skills of primary school teachers, particularly within the framework of their postgraduate education, including professional development courses.

Targeted didactic influences are necessary for the development of digital visualization skills among primary school teachers.

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# CASE MANAGERS' EXPERIENCES IN HANDLING PERSONAL DATA IN THE CASE MANAGEMENT PROCESS

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**Abstract.** *The article aims to uncover the personal data protection requirements within the case management process and outline areas for improvement. Objectives include analyzing case management, assessing families in social risk, and discussing personal data protection's concept and necessity in case management. The study examines factors influencing personal data protection in case management and identifies opportunities for improvement when working with families facing social risks. Participants are Vilnius-based case managers with at least one year of social work education and experience. Research methods involve analyzing literature, conducting interviews, and evaluating gathered data. The application of case management to families in social risk is viewed as a complex system, with a coordinated support network reducing social risk factors. Personal data is defined as information identifying an individual, necessitating protection due to technological advancements. The study reveals case managers lack knowledge about personal data protection requirements but strive to adhere to prudent principles. Institutional fear impedes information gathering from various sources due to concerns about violating personal data protection.*

**Keywords:** *case management, case manager, families experiencing, personal data protection, social risk, social work.*

## Introduction

Providing comprehensive assistance to families facing difficulties is a relevant topic in Lithuania, often sparking discussions about the overall purpose and effectiveness of the social protection system (Gražulis, Čižikiene, 2016; Augutavičius, Butvilas, 2018; Augutavičius 2019; Račkauskienė, Zbarauskienė, 2023). In such families, various issues are identified: "One or both parents have harmful habits; one or both parents threaten or use physical punishment as the primary disciplinary method; one or both parents treat children as their property; one or both parents fail to satisfy or threaten to fail to satisfy the child's vital needs; one or both parents use strong authoritarian control as a parenting method; the

family fanatically follows certain movements or stereotypes; unconditionally demands the child's obedience..." (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2003). A social worker must provide services by understanding and considering the specific family situation, best meeting the family's needs, and helping to address emerging problems (Čižikienė, 2018; Kiaunytė, Lygnugarienė, 2019; Nikolajenko, Raudytė, 2023). It is noteworthy that the duties of social workers in working with families at social risk in the Republic of Lithuania began in 2007. While the number of families and children experiencing social risk decreased from 2007 to 2015 in Lithuania, institutions providing social protection sought to ensure effective social support for these families and their children, aiming to minimize the prevalence of such families (Vasiliauskienė, Kavaliauskienė, 2021).

On July 1, 2018, the Law on the Basics of Child Rights Protection of the Republic of Lithuania (Lietuvos Respublikos Seimas, 1996) came into effect, outlining the organization of assistance to families for case managers using the case management method (Bajoraitė, Norvaišaitė, 2018; Gursansky, Harvey, 2020; Gudžinskienė, Šinkevičė, 2023). The provisions of the enacted law were accompanied by the order No. A-1-141 of the Ministry of Social Security and Labor of the Republic of Lithuania on March 29, 2018, On the Approval of the Case Management Procedure (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2018).

The Case Management Procedure was approved by the Ministry of Social Security and Labor of the Republic of Lithuania on March 29, 2018, (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2019) and it was subsequently amended by the order No. A1-802 on December 30, 2019 (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2019). This order came into effect on January 1, 2020, and is still in force. The Law on the Basics of Child Rights Protection of the Republic of Lithuania came into effect on July 1, 2018 (Lietuvos Respublikos Seimas, 1996). In this law, a case manager is described as a "social worker coordinating the case management process, appointed by the municipality's social service institution or another institution authorized by the municipality to provide social services to families in the municipality, under the leadership of the municipality or its authorized person." (Lietuvos Respublikos Seimas, 1996). The law defines the case management process as the "organization and provision of comprehensive assistance to the child and their representatives under the law, coordinated by the case manager, aiming to help them overcome social difficulties, the successful resolution of which would prevent potential violations of the child's rights and create conditions for independently ensuring the child's rights and legitimate interests."

*The research subject is the preparedness of case managers to apply personal data protection requirements in organizing the case management process for families experiencing social risk.*

*Research aim* – to uncover the requirements of personal data protection in the case management process, formulate and present areas for improving personal data protection in the case management process. *To achieve this goal, the following research tasks are addressed:*

1. Analyze the application of the case management process to families experiencing social risk, reveal the concept of personal data protection, and its need.
2. Evaluate the legal regulation of personal data protection in the context of case management when working with families.
3. Examine the factors influencing the peculiarities of personal data protection in the case management process and anticipate the possibilities for the development of personal data protection when working with families experiencing social risks.

*Research methods include :*

- Analysis of scientific literature and documents: EU legal acts, laws, and other documents are used to identify and define the peculiarities and the need for personal data protection in the case management process.
- Qualitative method: Semi-structured interviews with case managers are conducted to ensure objectivity and a deeper exploration of the chosen topic. The interviews aim to evaluate the opinions of the participants, collect research information, and identify trends in the phenomenon under study.

The literature review and research data have revealed the preparedness of case managers working with families experiencing social risk factors to apply the specific requirements of personal data protection.

### **Theoretical aspects of implementing case management process in social work**

Case management is a fundamental component of social work practice. The implementation of the case management process aims to create a coordinated network of assistance services for the service recipient (McLaughlin-Davis, 2018; Gursansky, Harvey, 2020; Gudžinskienė, Šinkevičė, 2023). It provides individuals with the knowledge and skills needed to overcome difficulties independently and encourages them to address emerging challenges on their own. In organizing the case management process, the case manager should focus on enabling service recipients to fully utilize their strengths through the coordinated assistance network, creating favorable conditions for effective communication with the surrounding social environment and dealing with experienced difficulties (Costin, Bran, 2017; Bajoraitė, Norvaišaitė, 2018; Holosko, 2018).

During case management, the case manager employs various methods in addressing the problems faced by families experiencing social risk (McLaughlin-

Davis, 2018; Gudžinskienė, Šinkevičė, 2023). One of the models used to identify needs is the Life Model, according to Gitterman, Germain (2008). In implementing this model, the case manager encourages family members to assess themselves, focusing not only on the problems but also on finding solutions. The case manager empowers service recipients to solve problems and handle complex life situations independently. By choosing this model, the case manager prioritizes strengthening the environment and social network of the family experiencing risk, empowering them to solve problems independently.

Other case management models include the Strengths-Based Approach Model, Crisis Intervention Model, Sociobehavioral (Behavioral Therapy) Model, Reality Therapy (Rational, Cognitive) Model, Communication Interaction (Communication) Model, Psychosocial Model, Functional Model, Social Structuring Model, Mediation Model, and Solution-Focused Approach Model. These models are applied depending on the specific needs and challenges faced by families at social risk (Shier, 2011; Raipa, Čepuraitė, 2017; Costin, Bran, 2017; Holosko, 2018).

The concept of "solutions" is essential in case management. Patron and O'Byrne (2020) argue that when people talk about the problems they face, they often present them as all-encompassing. Therefore, case managers need to seek situations (solutions) where these problems do not exist. The main goal is to avoid talking exclusively about the problem, as focusing on it can exacerbate the perceived difficulties. Case managers need to guide service recipients towards recognizing opportunities for problem resolution, asking questions that redirect attention to potential solutions rather than dwelling on the problem itself.

The Problem-Solving Model, as described by Shier (2011), emphasizes the case manager's role in helping families facing social risk, perform social tasks and ensure relationships with other community members. Studies on the social service system in Lithuania revealed a predominant model featuring characteristics empowering service recipients (Bajoraitė, Norvaišaitė, 2018). These empowering characteristics include social service management directed towards service recipients, respect for the dignity of service recipients, accessibility and availability of services, priority and continuity of services, service provision by an empowered institution, and the civil rights and decisions of service recipients (Kiaunytė, Lygnugarienė, 2019; Nikolajenko, Raudytė, 2023).

Many service recipients in families facing social risk lack a clear vision of their goals. Specialists providing services to these families often encounter rejection, resistance, and reluctance to engage in the assistance process. Negotiations between case managers and service recipients may involve difficulties, as some service recipients refuse to accept long-term goals, while others struggle to articulate their desires and needs (Holosko, 2018; McLaughlin-Davis, 2018).

Therefore, formulating goals effectively becomes crucial in negotiating assistance methods with service recipients. According to Parton and O'Byrne (2000), well-formulated goals should be expressed in the language used by service recipients and should be individualized, achievable, action-oriented, focused on the present, and controllable by the service recipient. These goals should emphasize positive aspects, representing the beginning of change in the service recipient's life, rather than reinforcing the familiar negative aspects.

The application of case management models in practice should empower service recipients to identify and independently address emerging challenges, improving the spiritual, social, and physical well-being of families facing social risk. The goal of the case management process is to enable service recipients to solve emerging difficulties through coordinated service delivery. Cooperation and timely sharing of relevant information between organizations providing assistance are crucial for achieving positive changes in families facing social risk, especially in meeting the physical and emotional needs of children growing up in these families.

The understanding of the concept of risk in families facing social risk is essential. According to Gražulis, Čižikienė (2016), families often encounter crisis situations or risk factors that disrupt the balance of family relationships and acceptable family functioning in society. Families successfully overcoming a crisis enter a new stage of successful functioning, while those unable to overcome a crisis become vulnerable and struggle to perform their intended functions.

Lithuanian legislation, such as the Law on Social Services of the Republic of Lithuania (Lietuvos Respublikos Seimas, 2006), introduces the concept of social risk. It includes circumstances and factors that may cause or pose a threat to experiencing social isolation for families or individuals. These factors include alcohol or substance dependence, gambling addiction, long-term unemployment and lack of motivation to participate in the labor market, involvement or tendency to engage in criminal activities, experience of harm due to criminal activities, harmful alcohol or substance use, various forms of violence, lack of social skills in family members, and inability to properly care for children's upbringing and development.

Children growing up in families facing social risk often lack a sense of security, self-confidence, and a sense of environment, as they acquire socially unacceptable behavior skills in their immediate surroundings. These children experience sadness, anxiety, decreased cognitive activity, diminished initiative.

#### Processing of Personal Data in the Case Management Process

Before the first meeting where the family case will be discussed, the case manager collects all the necessary information about the child and their family to coordinate and organize the case management process. If needed, the case manager also gathers information about extended family members or individuals closely related to the child, requesting information from social service providers,

educational institutions, law enforcement, and, if necessary, healthcare institutions. The case manager follows point 11 of the Case Management Procedure, (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2019) and aims to carry out the assessment of the child's and/or family's needs using the evaluation form specified in Annex 1 of the Case Management Procedure. The legitimacy of data processing and collection is justified according to Article 6(1)(c) and (d) of Regulation (EU) 2016/679 of the European Parliament and of the Council (Eur-lex, 2016), stating that processing is necessary for compliance with a legal obligation applicable to the data controller (in the case management process – the case manager) and for the protection of vital interests of the data subject (in this case, the child) or another natural person (family members).

The processing of special categories of personal data is carried out based on Article 9(2)(b) of the Regulation (Eur-lex, 2016), as the case manager processes the data of service recipients by fulfilling an obligation and utilizing special rights in the field of social protection. It also relies on Article 6(1)(e) of Regulation 2016/679, (Eur-lex, 2016), stating that data processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller (case manager) acting on behalf of the local government (in this case, the municipality).

It should be noted that all the mentioned organizations provide the necessary information about the child and their family to the case manager free of charge. When conducting the assessment of the child's and/or family's needs, the case manager follows point 32 of the Case Management Procedure (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2019), outlining the areas of need assessment: child development, parenting skills, family experiences, and social factors. The case manager identifies risk factors for family members and the child, assesses the level of their manifestation, and evaluates the strengths and abilities of the child and their family to use community assistance, as it can reduce the experienced risks.

During the assessment of the child's and/or family's needs, especially when there is more than one child in the family, each child is assessed individually. This is supported by Braslauskienė R. et al. (2022), who emphasizes that the needs of each child in a family experiencing assistance during the assessment must be evaluated individually. The author also notes that services providing assistance to families experiencing social risk should assess three main areas: parenting skills, child development, and family and community (Braslauskienė et al., 2022).

In point 34 of the Case Management Procedure (34.1–34.4) (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2019), four levels of intensity of the manifestation of social risk factors in a family experiencing social risk are presented:

- Level 0 is established when risk factors in the family are not identified, and the needs of family members and the child can be met through

preventive assistance to the child and their family and by using comprehensive services provided in the community.

- Level 1 is established when minor but concerning risk factors are identified. To address them, early intervention is needed, but by providing preventive services to the family and the growing child, concerning risk factors can be successfully overcome.
- Level 2 is established when areas requiring more attention due to more intense risk factors are highlighted, and resolving them requires early intervention and intensive work by a team of specialists.
- Level 3 is established when the situation of the child and their family indicates the need for intensive intervention, and identified risk factors cannot be addressed by providing early preventive assistance or using comprehensive services in the community.

Thus, the form for assessing the needs of the child and/or family is completed by identifying the strengths of the child and their family members, as well as the level of manifestation of social risk factors. If risk factors are not identified during the assessment of the needs of the child and/or family, and the level of manifestation of social risk is assessed as 0, the assessment is considered complete, and the case management process is not applied to the family. If the case manager decides not to initiate the case management process, social services are still provided to the family, and family members are informed about the comprehensive services available in the community during consultation.

In Article 36(1) of the Law of the Republic of Lithuania on the Fundamentals of the Rights of the Child (Lietuvos Respublikos Seimas, 1996), it is stated that the description of the child's situation includes the assessment of the received report about the child and the potential violation of the child's rights, determination of risk and protection factors, as well as the procedure for assessing the need for assistance to the child and/or their family and the procedure for determining the application of protection needs.

In cases where specialists from the State Child Rights Protection and Adoption Service determine the need for assistance to the child and/or their family, assistance to a family experiencing social risk is provided by the municipality. The case manager, together with the family members experiencing social risk, discusses acceptable ways and means of assistance to the family, aiming to help parents develop parenting skills, change attitudes towards child-rearing practices, ensure a physically and emotionally safe environment for the child, and meet the child's needs. Both family members and the child may receive consultations from a psychologist, social worker, family assistant support, and participate in group or individual positive parenting sessions. When the case manager identifies the need for comprehensive support for the family or child, the case management process is initiated.

The case manager forms a team of specialists, including representatives from the territorial department of the State Child Rights Protection and Adoption Service, educational, healthcare, and social service organizations within the municipality, as well as representatives from law enforcement institutions or specialists from other areas, taking into account the needs of the child and their family. Representatives from local communities and NGOs, as well as elders, may also be invited. In order to ensure the best interests of the child and protect information about the private life of the family, confidentiality requirements are applied to individuals participating in the family case review meeting. It should be noted that confidentiality requirements do not apply to the child's parents or other representatives of the child according to the law, but only if the information disclosed by the parents during the family case review meeting does not contradict the best interests of the child (Lietuvos Respublikos Seimas, 1996).

In summary, the initiation, organization, management, and implementation of the case management process are possible only when the assessment of the child's and/or family's needs is performed, and the level of manifestation of risk factors in the family is determined during the evaluation. The main goal of case management is to empower the family to act independently, utilize community resources, and ensure the safety and well-being of the child in the biological family.

### **Personal data protection in case management**

In order to reveal the peculiarities of case managers working with families experiencing social risk in implementing the requirements of the personal data protection process, a qualitative research strategy was chosen (Žydžiūnaitė, Sabaliauskas, 2017). The choice of a qualitative research strategy was conditioned by the fact that this approach allows for a deeper understanding of the essence of the research object. Qualitative research, according to Žukauskienė (2008), is a systematic study of a situation, event, individual, or group in a natural environment, aiming to understand the phenomena under investigation and provide a holistic, interpretive, and situationally synthesized phenomenon. The selection of such a research strategy was also motivated by the fact that the required information is obtained through direct, focused interviews with the research participant, with the direction and content of the conversation being determined by the research problem. The research problem is formulated with the question: What factors determine the successful implementation of personal data protection by case managers working with families experiencing social risk, and what are the peculiarities of the personal data protection implementation process highlighted in social work? *Research Object:* The preparation of case managers to apply personal data protection requirements in organizing case management processes for families experiencing social risk. *Research Aim:* To reveal the



requirements of the personal data protection process in the case management process, to formulate and present areas for improving personal data protection in the case management process.

For the empirical study, a scientific literature and document analysis were chosen. During this process, EU legislation, laws, and other documents were used to identify and define the peculiarities and the need for personal data protection in the case management process. To ensure the objectivity of the research and a deeper examination of the chosen topic, a semi-structured interview with case managers was applied.

*Selection Criteria* : Participants work as case managers for at least one year, apply the case management process to families experiencing social risk and with children in Vilnius, Lithuania. Seven case managers participated in the study.

The research was conducted through semi-structured interviews, allowing for flexible discussions between the researcher and the respondents. An initial questionnaire comprised a set of related questions that the respondents were required to answer. Problematic questions included: How do you ensure data protection in your professional activities? What difficulties arise when implementing personal data protection in professional activities? How familiar are you with the General Data Protection Regulation (GDPR)?

The research took place from March 2023 to October 2023, and the preliminary data obtained during this period are presented in this summary. More in-depth quantitative studies are needed for precise information.

*Research Results*: To assess the case managers' familiarity with the General Data Protection Regulation (GDPR), they were asked how their workplace introduced them to the GDPR and its implementation. Some respondents reported having training sessions on GDPR implementation at their workplace. They commented, "There were training sessions on GDPR, more like checking a box, they had no real value to me." Others mentioned a lack of training or discussions about GDPR at their workplace. One participant explained, "The institution did not introduce us, we had no training or any discussions during meetings. The administration told us to follow the GDPR, paradoxically, but that's how it is."

Additionally, the study revealed that case managers independently seek information about GDPR. During the interviews, it became clear that their knowledge of GDPR is limited. The participants mainly rely on colleagues, the media, and internet sources to gain knowledge about GDPR. Respondents shared their approach to dealing with questions related to personal data protection, expressing reliance on colleagues for advice: "If I ever doubt whether something can be disclosed and so on, there are always colleagues you can ask."

During the interviews, respondents' answers to the question "How do you ensure data protection in your work? What difficulties arise when applying personal data protection in professional activities?" revealed that respondents believe they ensure data protection in their work by not disclosing service

recipients' personal data. Their insights indicated that case managers are not familiar with the General Data Protection Regulation (GDPR), but despite not knowing the requirements, rules, and possible consequences of GDPR violations, case managers apply the principle of prudence in their work when organizing the case management process for families experiencing social risk, fearing to disclose excessive or inappropriate information.

From the responses provided by the respondents, it is evident that one of the problems encountered by case managers when applying the requirements of personal data protection in the case management process is that: "...too many of these GDPR requirements burden case managers; the workload is increased – organize assistance, monitor the situation, write documents, and additionally, take care of data protection..." (P\_7). Another research participant expressed similar concerns: "GDPR greatly complicates work; all institutions are afraid to violate it, it seems that we are now not working for the good of the family, but trying not to violate GDPR..." (P\_5). Thus, the responses of the research participants indicate that the application of the General Data Protection Regulation may potentially burden case managers' work and cause stress: "...it burdens too much, it causes stress, whether it is really necessary, I don't know" (P\_7). It can be assumed that case managers find it difficult to ensure the protection of personal data not only because they may lack knowledge about personal data protection but also because other institutions are reluctant to provide case managers with the necessary data, fearing to violate GDPR.

The responses of the research participants revealed that the application of the General Data Protection Regulation complicates the work of case managers in the case management process because both in providing and collecting information about service recipients, case managers and the institutions providing information about service recipients strive not to violate the requirements of the General Data Protection Regulation. During the study, it became clear that respondents experience a greater workload and tension due to the requirements of personal data protection.

The study participants indicated that, in order to improve the application of personal data protection requirements in the case management process, it is necessary to start with revising the Case Management Procedure, expanding the authority of the case manager regarding information gathering: "...remind ministries that services for the family are organized and applied by case managers, not child rights specialists, and that case managers need information about the family and opportunities to collect and obtain that information without intermediaries" (P\_2). This respondent's opinion was supported by another research participant: "...draw attention to management within the ministry and the fact that case management already receives all sensitive information from child rights, so why can't we obtain it ourselves, reducing bureaucracy?" (P\_4). During the study, it was noted that almost all respondents mentioned that organizing the

case management process would help them ensure compliance with personal data protection requirements: "...digitized files. Special tools and access to data with individually assigned permissions. Files should be transferred within the general social services system...initiate the digitization process and actions at the national level to comply with GDPR" (P\_3). This opinion was also supported by another research participant: "I can say yes, for centers implementing case management – digitize processes, meaning transfer all paperwork into a digital space, and each case manager should have personal access" (P\_4).

The research participants were asked to consider and provide suggestions on what could be done in the future to ensure proper personal data protection in the case management process: "What do you think needs to be changed to achieve effective implementation of personal data protection in the activities of a case manager? The research participants, in providing suggestions, emphasized the need for filling out the case management procedure: "Case managers should have clear instructions on how to work with client data, how long to keep client data, where to store it, and there should also be an algorithm for how case managers transfer data to other organizations to ensure their safety... The ministry should create conditions for case managers to access necessary data, expand the capabilities of case managers, and clarify responsibility for the security of acquired data" (P\_4). Another research participant not only supported this idea but also proposed including case managers themselves in the expansion of the Case Management Procedure: "This again involves including practitioners, adjusting the case management procedure regarding certain things, whether or not, because it needs to be constantly adjusted, as the issues change, the situations change, and it needs to be constantly updated, reviewed..." (P\_6).

Summing up the responses, it can be concluded that case managers acquire limited knowledge about GDPR from colleagues, the media, or the internet. The participants' answers raise concerns about whether case managers who gain knowledge in such ways can effectively ensure personal data protection during the case management process. It can be assumed that the management of social service institutions providing case management services for families experiencing social risk does not understand the importance of GDPR and does not appreciate the potential harm and consequences to their institutions if proper data protection is not ensured.

## **Conclusions**

The research results indicate that case managers, in their efforts to ensure proper personal data protection during the case management process, would prefer a unified internal system for organizations applying case management processes across Lithuania. Such a system would store all personal information about

service recipients, transfer recipient files and documents, and send and receive information, allowing each case manager to personally access the system.

The concept of personal data in legal acts and official documents is formulated differently. Personal data is understood as any information related to an individual whose identity can be established. The issue of personal privacy protection became relevant in Europe only after World War II, with the establishment of democracy. With the rapid development of information technology, the need to protect personal information arose, and personal data protection was regulated at both international and national levels. Despite existing regulations, the concerns of Lithuanian and other European Union citizens about data security persist. Therefore, strict personal data protection measures are necessary.

The study revealed that the case manager, when organizing services for a family experiencing social risk and the child growing up in it, gathers information about service recipients from various institutions. However, due to the adoption of the General Data Protection Regulation and the need to comply with its provisions, information gathering is hindered because institutions, fearing to violate personal data protection, do not provide the necessary information for the implementation of the case management process. The research results showed that case managers, in order to ensure proper personal data protection during the case management process, would like to have a common internal system among organizations implementing the case management process nationwide in Lithuania. This system would store all personal information of service recipients, transfer service recipient files and documents related to service recipients, and allow each case manager to personally access the system. The study found that a new revision of the Case Management Procedure is needed, expanding the capabilities of case managers to collect information about members of families experiencing social risk and their children, and obliging all organizations to provide information to the case manager.

During the study, it was found that there is no specific definition describing the case management process in scientific sources. However, in most academic literature, the case management process is described as the provision of comprehensive assistance to service recipients experiencing social risk by engaging specialists and institutions providing services to families and their children. The case management process, as a method of social work, is clearly structured and organized, following a clear sequence of actions and measures. Case managers ensure that service recipients receive individualized, comprehensive services that best meet their expectations and needs.

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# CHALLENGES AND PERSPECTIVES IN TRAINING TEACHERS FOR ELEMENTARY SCHOOL NON- FORMAL EDUCATION IN CONTEMPORARY CHINA

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**Abstract:** *China has seen significant changes in its educational landscape recently, with a growing focus on holistic education for primary school students. Alongside formal schooling, non-formal education has become increasingly important, seen as a vital supplement to traditional classroom learning. However, the Chinese government perceives the widespread enthusiasm among parents for non-formal education as a negative trend, hindering positive qualitative changes in formal education. There are concerns about the lack of control, particularly regarding ideological influence, educator training, and service quality within the non-formal education sector, which also involves substantial financial investment. This article, drawing from publicly available sources, assesses the current state of China's non-formal education sector and examines the measures undertaken by the government in the past five years to enhance the quality of educational services. Additionally, it explores the future prospects of non-formal education in China within the context of policies aimed at reducing student burdens and improving educational service quality. The focus of the study is on primary and elementary school students, as this age group constitutes the primary target audience for non-formal educational opportunities in modern China.*

**Keywords:** *elementary education, non-formal education, PR China, primary education, teacher training programs.*

## Introduction

China's educational system has undergone significant transformations in recent years. Modern trends in the humanisation of the content, methods and forms of the pedagogical process, orientation towards the identification of the individuality of each student, place high demands on the personality of the teacher and improvement of their professional competence. The level of education and the degree of moral readiness of the younger generation for life and work largely depend on the teacher, his/her pedagogical competence and personal qualities. Moreover, it is necessary to install the love of learning from childhood, which requires increased attention to the training of teachers of primary and elementary

schools, who can teach both in formal and non-formal educational institution. It should be mentioned that the non-formal education sector has gained prominence as a crucial complement to traditional classroom learning. However, on the other hand, the Chinese government views the mass enthusiasm of Chinese parents for the opportunities that non-formal education provides as a negative trend that prevents qualitative positive changes from changes in formal education in the country. This article aims to offer an overview of the current status of educational services offered within China's non-formal education sector, with a specific focus on primary school students. Additionally, it seeks to examine the engagement of educational administration institutions in the People's Republic of China (PRC) with this socio-pedagogical phenomenon. Special emphasis is placed on the training practices for teachers intending to work in the informal education sector, highlighting the notable absence of such initiatives and the limited educational and pedagogical endeavors in this area. The methodology employed in this article encompasses critical analysis, systematization, and generalization of approaches to the discussed issue. It involves addressing tasks such as defining the non-formal education sector in China, identifying challenges and prospects in training teachers for non-formal education at the elementary school level, and summarizing the various forms of teacher training within this context.

### **Literature review**

During the development of the article, the authors consulted two primary sources of literature: academic scientific publications and official documents from various governmental levels. The academic research encompassed studies by Gong Shi (2016) on the role of for-profit schools in China, investigations by Yu Hongnan and Wu Dongping (2020) regarding online learning among university students and the utilisation of mobile applications, perspectives on education hotspots as analysed by Huang Hao (2021), exploration of the development of private education in China by Fang Xiaotian (2019), and examinations of the distinctions between Chinese state and non-state educational institutions by D. Connor (2020) and Lan Ju (2019). Additionally, the authors referenced official documents sourced from governmental websites at different administrative levels:

- Advice on the organisation of teaching internships [AOTI] from the official site of Guangzhou Provincial Employment Bureau (2022);
- Law of the People's Republic of China on Compulsory Education [LPRCCE] from the official site of the State Council of the Peoples Republic of China (2015);
- Norms of a teacher's pedagogical internship [NTPI] from the news of education science (News of education science, 2022)



- Pedagogical internship practice [PIP] from the Chinese education online (2022);
- Regulations on the Implementation of the Law of the People's Republic of China on Promotion of Private Education [RILPRCPPE] from the official site of the State Council of the Peoples Republic of China (2021).

Information gleaned from the "China Education Development 2021 Report" (Deloitte research, 2022) and "International schools in China" (International School Consortium, 2024) offered the authors valuable insights into the operational dynamics of contemporary non-formal educational institutions catering to primary and elementary levels in China.

### **Methodology**

Studying the challenges and perspectives in training teachers for elementary school non-formal education in contemporary China involve various scientific methods. Literature Review (existing academic literature, research papers, policy documents, and educational reports related to non-formal education and teacher training in China) to help in identifying key challenges and potential future directions. Case Studies method was used for analysing the practice of successful and innovative teacher training programs for non-formal education in China that are introduced now to some of Chinese high educational institutions. Somehow the Qualitative interview method was used to study education experts', government officials', school administrators' and teachers' point of view as to non-formal education as a social and pedagogical phenomenon in China and its perspectives in the country. Comparative Analysis method helped to find out the peculiarities and differences in teacher training programs for future specialists who plan to work in formal and non-formal education in China. By employing a combination of these scientific methods, the authors of the article gained a comprehensive understanding of the challenges and perspectives in training teachers for elementary school non-formal education in contemporary China.

### **Research results**

According to the definition provided in the "Law of the People's Republic of China on Compulsory Education," non-formal education embodies a comprehensive educational approach that integrates pragmatic political, ideological, and moral teachings with professional education. Its overarching goal is to harmonise the nation's and society's significant objectives with the individual aspirations of each person. Considering the realities within China, the term "non-formal education" encompasses all educational services provided by private individuals or other non-state entities, organisations, and institutes. This

interpretation aligns with the provisions outlined in Article 8 of the “Law of the People's Republic of China on Compulsory Education,” which defines "education" exclusively as "education centrally provided by the state," with the law's provisions applying to all levels and types of education within the territory of the People's Republic of China. Hence, it can be inferred that all types of educational services provided within the state but not funded by the state budget and not organised by or on behalf of the state can be classified as institutions within the non-formal education sector (State Council of the Peoples Republic of China, 2015).

Presently, in China, there are emerging efforts to integrate non-formal/non-state education into the framework of educational services provision on behalf of the state, although this process is still in its nascent stages. The state actively encourages, comprehensively supports, and provides practical guidance and management the non-formal education in the country and governmental bodies of all levels are mandated to incorporate non-state education into economic and social development programs, aligning with the objectives of implementing the state's development strategy through science and education, fostering the healthy advancement of non-state education, and safeguarding the rights and legitimate interests of non-state educational institutions and individuals undergoing education (State Council of the Peoples Republic of China, 2021).

China acknowledges significant progress and potential within its non-formal education sector, as defined by the state and society. However, as the number and diversity of educational services offered within the non-formal sector continue to expand, new challenges emerge. From the perspective of the Chinese government, the non-formal education sector is inadequately regulated, particularly concerning ideological direction, educator training, and service quality, while also involving substantial financial investments. The primary challenges and discussions, both in scholarly circles and the public domain, revolve around the following aspects:

- the potential of social pragmatism within the non-formal education sector (is substantial, considering the vast scale of educational service demands and human resource potential in China);
- sustained demand for non-formal education (reflects the challenging transition of Chinese public education from scale-oriented to efficiency-driven);
- state policies and societal support for non-formal education (present a dual dynamic: while the state restricts their activities to educational pursuits, the necessity to secure funding undermines the autonomy and independence of such educational institutions);
- challenges faced by Chinese non-state educational institutions (highlight the need for a more proactive clarification of their legal status within the country's educational landscape, along with specific

structural definitions and regulatory frameworks in political and legal operations) (Lan, 2019; Shi & Sha, 2018).

As of today, the People's Republic of China boasts a considerable number and diverse array of non-state educational service providers, falling under the purview of the "non-formal education" sector as defined in China. These non-state education providers can be categorised into two main groups:

1. Non-profit organisations affiliated with social and professional associations, trade unions, and various philanthropic entities.
2. Commercial entities offering certified courses within the school curriculum, registered with the tax authorities and civil affairs department. They are permitted to conduct educational activities only upon obtaining licensure from the local education department.

Non-state educational institutions in China typically fall into the following types:

- educational institutions established with government support.
- independent schools initiated by individuals or groups (often based on existing educational institutions).
- schools established with capital investment from individuals or organisations, serving as co-founders alongside a state enterprise or institution.
- tutoring services (Fang, 2019).

In major urban centres across the country, a comprehensive range of non-formal educational institutions is typically available. These urban areas often see the establishment of "educational consortia," which bring together kindergartens, schools at all levels, and even colleges and universities. Conversely, in medium and small cities throughout China, non-public primary and secondary schools (grades 1-9) are more prevalent. Meanwhile, in county centers and rural regions, primary schools (grades 1-5) tend to be the primary educational institutions. (Deloitte research, 2022).

The term "private schools" specifically refers to private institutions that potentially compete directly with the public education system, providing education from preschool through higher education. On November 7, 2016, the Standing Committee of the National People's Congress of China enacted an amendment to the "Law on Education," aimed at fostering the development of private schools. This amendment came into effect on September 1, 2017. Private schools typically feature smaller class sizes (ranging from 25 to 35 students compared to 35 to 50 students in public schools), with an emphasis on English language learning starting from the 1st grade, which is earlier than in public schools (where it typically begins in the 3rd grade and with less emphasis) (Gong, 2016).

Another prevalent form of non-formal education is the international school

consortium (ISC), often referred to as an "international school." These institutions offer secondary education and deliver curricula for various educational levels (including preschool, primary, and secondary) predominantly in English, typically outside of English-speaking countries. As of January 2019, the ISC reported that China hosts 681 international schools with approximately 230,000 students. A majority of these international schools are situated in China's primary expatriate hubs, such as Beijing, Shanghai, Shenzhen, Chengdu, and Guangdong Province. According to Chinese regulations, international schools are exclusively permitted to enrol students who hold citizenship from countries other than China (with exceptions granted for students from Macau, Hong Kong, and Taiwan, although their enrolment in schools in Beijing is subject to limitations). (International School Consortium, 2024).

Online courses, workshops, and webinars have gained significant popularity in modern China, mirroring trends observed worldwide. The formats and methodologies of online education in China closely resemble those favored globally, albeit with the state seeking to regulate this form of educational service. Public educational institutions in China, focusing on research and supplementary educational activities, typically encourage their students to utilize two state-sponsored internet platforms: Dowdou (targeting children aged 3-12) and CERNET (designed for middle and high school students). In 1994, China established the CERNET research educational network, which rapidly expanded and soon brought together 30 universities across the country offering distance and blended learning services. This initiative evolved into the National Open Education Platform, officially inaugurated by the China State Education Administration in 2002. The platform functions as a communication hub, facilitating exchanges, publications, and resource access for providers and users across all educational levels and educational forms (Huang, 2021). Presently in China, online learning resources are seamlessly integrated into the national education system, particularly in teacher training. Platforms such as QQ Live, China University MOOC, DingTalk, Tencent Classroom, Chaoxing, WeChat Group, Tree Wisdom, and Tencent Conference, among others, play pivotal roles in this regard. It's worth noting that individuals and groups offering such educational services are required to establish private enterprises, obtain licenses for educational activities from the local education department, and register with the local tax office to conduct these activities (renewable every five years).

Despite the widespread popularity of non-formal education in China, it is important to highlight the absence of specialised educational programs in the country geared towards preparing teachers to work with children aged 6-10 in the non-formal education sector. Consequently, professionals who have graduated from formal pedagogical institutions are often recruited to work with primary and elementary school students. However, in accordance with the mandated level of training for teachers of various categories, educators for primary and elementary

schools are required to attain a minimum educational level, typically a junior specialist certification, and undergo additional training as necessary (Connor, 2022). The additional training provided to elementary and primary school teachers must fulfil the following criteria set by the non-formal sector:

- equipping teachers with practical skills and abilities, known as "shuangshi" teachers, who possess not only extensive theoretical knowledge but also practical experience working in educational institutions.
- cultivating practical capabilities and skills, such as problem-solving through methods like planning, organisation, design, production, operation, management, and other applicable techniques (Guangzhou Provincial Employment Bureau, 2022; News of education science, 2011).

Young teachers often experience insecurity in their actions and professional capabilities, particularly when venturing into the realm of non-formal education. This uncertainty can lead to feelings of dissatisfaction with both themselves and their chosen profession. In response to this challenge, a pedagogical internship program has been established to provide support to novice teachers in elementary and primary schools who are embarking on their careers. The pedagogical internship program for elementary education teachers destined for the non-formal education system typically includes:

- the intern teacher's engagement in observing and analysing the pedagogical practices of experienced educators, as well as their own teaching methods. They are encouraged to reflect on their experiences, devise individual plans (or programs), and implement them;
- the tutor (or mentor) undertakes systematic efforts to assist the intern teacher in gaining proficiency in independent professional practice based on the execution of their individual program. This involves providing guidance, feedback, and support throughout the process.

The tutor assumes various responsibilities, including fostering the intern's interest in pedagogical activities, motivating them to excel in their role, fostering their ability to perform professional duties independently and effectively, facilitating their adaptation to the institutional culture, and cultivating a creative approach to their responsibilities. This support may be provided on an individual or group basis. Chinese experts assert that a year-long pedagogical internship (or "teacher's assistant" role) enables young professionals to acquire essential practical skills necessary for future independent work. It helps them comprehend the structure and nuances of the educational process as a professional activity within a specific institution. Furthermore, it allows them to gradually integrate into teaching roles within the non-formal education sector as competent and autonomous specialists, thereby mitigating any perceptions of inexperience from

students and parents (Chinese education online, 2021).

In the People's Republic of China, a young specialist undergoing a pedagogical internship gradually integrates into practical teaching duties, typically being assigned to a specific class (which constitutes 45% to 55% of their workload). The remaining time is dedicated to engaging with the assigned class, establishing rapport with students, assisting with homework, organising leisure activities, and accompanying them to extracurricular events (News of education science, 2022). In broad terms, the activities of an intern teacher encompass three main areas: teaching, general pedagogical tasks, and educational activities. The key events and responsibilities within each component are outlined in Table 1.

*Table 1 Structure of pedagogical internship  
(Guangzhou Provincial Employment Bureau, 2022)*

<b>Directions of activity</b>	<b>Amount of time</b>	<b>Form of activity</b>	<b>Events</b>
general pedagogical activity	up to 20%	group, individual, face-to-face	general pedagogical and psychological observation of the class; keeping a diary of the student's development; drawing up characteristics of students based on the diary; interaction with other subject teachers, school administration, local self-government bodies and other controlling bodies, parent committee; participation in methodical and other professional and organisational events organised by the school, governing bodies of the field of education, etc.
teaching activity	up to 50%	individual, group, face-to-face, distant	<i>first term:</i> preparation of material (including visuals) for conducting practical classes by the main teacher; development and verification of work on current and final control; selection of additional literature and materials for students' individual and homework; preparation of a student for participation in the Olympiads of local and regional levels; attendance at classes; other types of work at the request of the main teacher; <i>second semester:</i> conducting classes in the presence of the main teacher (up to 30% of the workload of the main teacher) - added to the types of work recommended for the 1st semester

educational	up to 30 %	group, face to face	development and implementation of educational activities according to the plan of the educational institution; organization of additional excursions, attendance at external events (in coordination with the administration of the institution), which should contribute to the ideological, moral, and aesthetic development of students; help in solving interpersonal problems that arise between students of the class; communication with the parents of students regarding the performance, well-being, and behavior of students in the class
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Another method of training primary and elementary school teachers for non-formal education involves preparatory courses conducted at the workplace. The duration and content of these courses, as well as the decision to enrol in them, are determined by the school administration and the individual teachers themselves. Even if the administration deems a young teacher adequately prepared for the job or if the teacher already possesses teaching experience, the teacher may still opt to take these courses upon their own request. In such cases, the courses can be completed during free teaching periods, concurrently with regular duties, or through a condensed program. Unlike pedagogical internships, which are typically undertaken only once upon initial employment, teachers can participate in preparatory courses multiple times, particularly when transitioning to new workplaces with differing educational models, methodologies, or curriculum frameworks.

Despite the widespread popularity of non-formal education, it is noteworthy that China currently shows limited interest in expanding the functional capacities of non-formal education institutions. This reluctance is attributed to the ideological monopoly of the state, which oversees the education system as its official leader and representative. Officially, this stance is linked to the "policy of reducing the psychological and educational burden on students" and the "state strategy for enhancing the quality of educational services." However, all initiatives in this regard are ultimately subject to state control.

### Conclusions

Non-formal education has emerged as a significant component of the educational landscape in China. With a burgeoning demand for non-formal education among Chinese parents seeking to provide their children with additional learning opportunities beyond the formal curriculum, significant financial resources are being allocated to this sector. The government, keen on controlling these financial flows, seeks to ensure that they align with its educational policies and priorities. Furthermore, the increasing popularity and competitiveness of

non-formal education pose challenges to the traditional formal education sector in China. Non-formal education institutions, characterised by their flexible teaching approaches, specialised curricula, and innovative pedagogical methods, have emerged as formidable competitors to formal educational institutions. The competitive dynamics between non-formal and formal education sectors could drive improvements in both spheres. Increased competition may compel formal educational institutions to innovate and adapt, enhancing their quality and responsiveness to student needs. The coexistence of formal and non-formal education sectors in China holds the promise of a more robust and inclusive educational landscape, capable of meeting the diverse needs and aspirations of Chinese learners in the 21st century.

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## EXERCISE PROMOTION AMONG SCHOOL STUDENTS THROUGH STREET WORKOUT

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**Abstract.** *Today in Ukraine, there is a steady trend towards health deterioration of the younger generation. This negative phenomenon is associated with insufficient motor activity of young people (Rymar, Sorokolit, Solovey, Yaroshyk & Khanikiants, 2021; Solovey, Vovkanych, Sorokolit, Rymar, Yaroshyk & Novokshonov, 2021; Yaroshyk, Rymar, Malanchuk, Solovey, Khanikiants & Bubela, 2021). This problem can be solved by developing a positive attitude towards physical exercises, promoting trendy sports. Street workout is popular among young people. This type of activity is safe and suitable for anyone regardless of age, gender and level of physical fitness (Sanchez-Martinez, Plaza, Araneda, Sánchez & Almagiã, 2017; Taipei-Nasimba & Cantón Chirivella, 2020).*

*Purpose of the article – development of measures to promote physical activity among school students through Street workout. Methods: theoretical analysis and generalization; pedagogical observation; survey; mathematical statistics methods.*

*A redistribution of self-assessed motor activity was recorded among school students at the end of the pedagogical observation after the implementation of the developed measures. Thus, the number of school students whose self-assessment grades were "excellent," "good," and "satisfactory" increased by 19.5%, 10% and 13.4% respectively. There was a 20.2% increase*

*in the number of school students who regularly attended sports clubs. The number of school students who began to engage in physical activity at home increased by 12.8%. The number of school students who started doing morning gymnastics also increased by 13.5%. At the end of the pedagogical observation, the duration of sleep in most school students increased to 7-7.5 hours, and sleep quality improved and reached 6 points.*

**Keywords:** motor activity, promotion, school students, street workout.

## Introduction

Today, 80% of teenagers in Ukraine and the world do not reach the recommended level of physical activity, which negatively affects their health. Therefore, the system of physical education requires immediate measures to update its structure and content. The introduction of the latest technologies, new methods and tools will contribute to a more personal approach to each student and increase the interest of the younger generation in physical education and sports. Street workout is popular among young people. This type of activity is safe and suitable for anyone regardless of age, gender and level of physical fitness (Sanchez-Martinez et al., 2017; Taïpe-Nasimba & Chirivella, 2020). Also, it has been proven that street workout has a positive impact on physical and emotional state of young people (Sanchez-Martinez et al., 2017; Taïpe-Nasimba & Chirivella, 2020; Podrihalo, Podrigalo, Kiprych, Galashko, Alekseev & Tropin, 2021; Schlegel, Sedláková & Křehký, 2022). This makes the chosen topic for the article both important and relevant.

The purpose of the article was to develop measures to promote physical activity among school students through street workout. The following methods were used to achieve the set goal: theoretical analysis and generalization; pedagogical observation; survey; mathematical statistics methods.

**Literature review.** Theoretical analysis and generalization of information sources made it possible to clarify the motivational and health-improving potential of street workout in the system of physical education of school students. According to scientists (Stochmal, 2017; Amatriain-Fernandez & Leyton-Román, 2019; Bajraktari & Kryeziu, 2019; Lechowicz & Stochmal, 2019; Skiba & Pilch, 2020; Sobota, 2020), the main motivational factors for street workouts are: improving physical health, healthy living, self-expression and creativity, appearance and aesthetics, social interaction, improving general well-being, challenge and satisfaction from an achievement, freedom (no limitations like need for exercise machines or special equipment), coaching support, community and social networks, enjoyable pastime. The healing potential of street workout lies in its complex positive effect on the body of young people. According research results (Taïpe-Nasimba & Chirivella, 2020; Podrihalo et al., 2021; Schlegel, Sedláková & Křehký, 2022), improvement of the physical and emotional state of the body as well as the development of will and moral qualities were observed in young people after street workout sessions. Research (Sanchez-Martinez et al.,

2017) showed that systematic street workouts not only increase the proportion of muscle tissue in athletes, but also significantly reduce fat content. Therefore, it can be concluded that the longer athletes practice street workouts, the higher will be the percentage of athletes with harmonious indicators of physical development.

**Methodology.** The conducted pedagogic observation of school students aged 15-18 who started attending street workout sessions (30 people) lasted 7 months. Pedagogical observation made it possible to broadly and multidimensionally evaluate approaches to the educational and training process, describe the interaction of all its participants and establish the regularity of attending classes, learn about the peculiarities of engagement and communication between school students, their preferences and interests. Using the questionnaire method, we learned about the self-assessed motor activity of young people, their motives for motor activity and popular forms of motor activity among school students.

**Research results.** Our survey made it possible to determine the main motivations of school students for participating in physical activity classes (table 1).

*Table 1 Motivations of school students for participation in physical activity classes, % (n=30) (made by authors)*

Motivation	Boys answers, %	Girls answers, %	Answers of boys and girls together, %
Get consultations for independent classes	36,6	23,3	29,9
Optimize weight, improve figure	40,0	56,6	48,3
Use free time rationally, ensure active leisure	43,3	19,8	31,5
Increase work capacity, physical fitness	26,6	19,8	23,2
Improve health	46,6	36,6	41,6
Cultivate will, character	23,3	13,2	18,2
Increase motor activity	46,6	40,0	43,3
Get relief from cognitive fatigue	73,3	73,3	73,3
Communicate with friends	90,0	83,3	86,6

The results of the survey showed that the leading motives for engaging in physical activity among our respondents are: communication with friends (86.6%), relief from cognitive fatigue (73.3%), weight optimization and figure improvement (48.3%), increasing motor activity (43.3%) and health improvement (41.6%). At the same time, the survey data show that only 19.8% of the surveyed school students do physical exercises 3-4 times a week. Most students limit their physical activity only to mandatory physical education lessons and, judging by the respondents' answers, they fill their free time with activities that have nothing

to do with active leisure and physical activity. We assume that this can be caused by two reasons: firstly, school students do not realize the importance of physical education for their life and work, its role in preserving and improving health; secondly, perhaps they have not yet found the type of activity that would arouse a strong interest and desire for regular classes.

As a result of the survey, we also found out that the majority of high school students (90%) have a positive attitude to the introduction of innovations in the process of physical education. In their opinion, it is advisable to include such types of motor activity to different forms of physical education as: various types of fitness, workout (parkour), yoga, functional training, fit ball, exercises with equipment and step aerobics.

We discovered the peculiarities of high school students' motor activity in the course of pedagogical observation and determined its assessment (questionnaire). The analysis of the obtained data showed that many high school students rate their motor activity highly at the beginning of the pedagogical observation. 33.3% of respondents interviewed by us believe that their motor activity corresponds to 5 points, and 23.3 and 26.6% of respondents assign it 4 and 3 points, respectively. Such data confirm the results of a number of scientists who state a rapid decrease in the motor activity of school students, especially when switching to a remote form of education (Yaroshyk et al., 2021).

The following questions of our questionnaire allowed us to find out which forms and types of motor activity dominated among school students. It turned out that few students – only 19.8% – engaged in regular specially organized physical activity at the gym, sports club or swimming pool. They spent 1-2 hours at such classes three or four times a week. 40.0% of respondents noted that they engaged in physical activity at home. 23.3% of school students did not engage in organized physical activity at all. The rest of the interviewees sometimes did physical exercises. On average, the daily organized motor activity of young people lasted from 30 to 60 minutes. As for types of motor activity, strength-oriented training dominated among our respondents – 52.8%, cardio training – 26.6% and training in the fresh air (biking, rollerblading, sports games and swimming in a natural reservoir) – 73, 3%. A significant percentage of school students used digital and online resources during motor activity to increase the effectiveness of classes and gain new knowledge - 36.6%. The percentage of school students who started their morning with exercise turned out to be catastrophically low – 19.8%. The majority of teenagers did not engage in organized physical activity during breaks – 56.6% of respondents. We assume that such low involvement of senior school students in various forms of physical education is related to the traditional format of their implementation. Most of the school students we interviewed gave a low assessment to traditional forms of motor activity. According to the results of the survey, we also found out that most school students feel tired and rate it from 5 to 8 points at the beginning and at the end of the week, respectively. The average

score of fatigue of high school students for the last six months was 7 points. We assume that school students do not have time to recover because the quality and duration of their sleep is also far from the established norms. Thus, on average, the school students interviewed by us sleep 6-6.5 hours and rate the quality of sleep as low as 4 points.

### **Measures to promote physical activity among school students through street workout.**

1. A page on Facebook was created, which is dedicated to sports activities related to the school; student achievements; articles on healthy eating and dietary fiber; information about sports events in the city and region. This approach enables students and parents to get more information about the sports life of the school, city, region, establishes close cooperation with parents, ensures the creative self-realization of the child and the teacher, equips them with knowledge and develops the ability to independently engage in physical exercises with the help of innovative technologies.

2. Movement breaks, physical education breaks, and physical education minutes have been resumed. New forms of motor activity during breaks have been introduced: fitness breaks, sports breaks, dance breaks, darts, frisbee competitions, scooter, roller, and bicycle races. These activities increase the level of motor activity of students during the day, allow them to get acquainted with new types and forms of motor activity and form an interest in physical education classes, ensure self-affirmation in the team, the desire to spend leisure time with friends in an interesting and healthy way.

3. Webinars on leading a healthy lifestyle and modern types of physical activity have been organized for school students. "Me and a healthy lifestyle," "Basics of rational nutrition," "Physical potential of a person." These activities are designed to enrich students' physical education experience, encourage them to self-educate and form a desire to be healthy and attractive.

4. An educational task "I am a future teacher" has been implemented for high school students during physical education lessons. Conditions are created for students to implement their own experience gained in sports sections or as a result of self-education on their favorite types of physical activity. The student-teacher is given 15 minutes to share their knowledge with their classmates. Such tasks stimulate the active and creative participation of students during lessons, enrich their vocabulary on sports topics, allow them to apply the acquired knowledge in practical activities, and promote those types of activity that are not included in the school curriculum.

5. Analysis of health programs on gadgets has been introduced. This allows students to monitor weight, sleep, heart rate, and homework.

6. Conditions have been created for independent street workout sessions. Students are given access to a sports hall and a playground with the necessary equipment.

7. Students were subscribed to popular Telegram channels (Street Workout Zhytomyr, workoutlvivcup), which provide an opportunity to deepen their knowledge of the elements of street workout, communicate with like-minded people, learn about the latest achievements in this type of motor activity, as well as competitions and their results.

8. Fan and support groups for athlete idols were created for the duration of street workout competitions.

9. A sports team was created to take part in street workout competitions.

10. Workout play list was made based on students' preferences.

11. Regular feedback was established with school students on the quality of motor activity at school (3 questionnaires per academic year).

12. The tradition of weekly meetings with the physical education teacher for consultation on current issues was started.

13. A public Telegram group has been created, where participants can share achievements, communicate with like-minded people, ask the physical education teacher questions and share general impressions from workouts.

14. A special training course for school students "STREET WORKOUT: discover a new level of motivation in your training!" was developed and implemented. The training course contains information about: historical aspects of the emergence and development of street workout; achievements of Ukrainian athletes in street workout; basic elements and requirements for their proper execution; "amazing exercises" in street workout; peculiarities of the development of physical qualities necessary for the performance of basic elements; the results of scientific research on the impact of street workout on the quality of human life; the basics of nutrition when engaging in strength types of motor activity; indications and contraindications for street workout; safety rules during classes.

Carrying out various measures to popularize motor activity, in particular using the means, principles and traditions of the street workout subculture, we saw significant changes during pedagogical observation (table 2). A redistribution was recorded among school students according to self-assessment of motor activity at the end of the pedagogical observation. Thus, there were 19.5%, 10% and 13.4% more students whose self-assessment corresponded to the grades "excellent," "good" and "satisfactory," respectively. The fact that there was not a single school student who would assign one or two points to their motor activity is also positive. At the beginning of the observation, 13.2% of the surveyed school students had a low self- assessment regarding motor activity.

**Table 2 Involvement of high school students in various forms and types of motor activity during pedagogical observation, % (n=30) (made by authors)**

Forms and types of motor activity	Yes		No		Sometimes	
	Start of PO	End of PO	Start of PO	End of PO	Start of PO	End of PO
Organized MA in a gym, sports club or section, swimming pool	19,8	40,0	23,3	16,7	56,6	43,3
Organized MA at home	40,0	52,8	23,3	13,2	36,6	33,3
Independent training without a teacher	33,3	56,6	–	–	–	–
Independent training with a teacher	66,7	43,3	–	–	–	–
Regular morning gymnastics	19,8	33,3	56,6	43,3	23,3	23,3
Organized MA during breaks	26,6	46,6	56,6	26,6	16,7	16,7
Physical education classes	73,3	73,3	19,8	19,8	6,6	6,6
Exercises for strengthening main skeletal muscles	63,3	76,6	23,3	13,2	13,2	9,9

Source: PO – pedagogical observation; MA – motor activity

The number of school students who started regularly attending the street workout sports club increased by 20.2%. The duration of classes was 1.5-2 hours 3-4 times a week. 12.8% more school students started engaging in physical activity independently at home. The percentage of school students who sometimes engaged in physical activity also decreased. Street workout, yoga and walks were added to the types of motor activity of school students. We assume that such positive changes are primarily due to the fact that the school students themselves initiated the organization of a street workout sports club. All that was needed from the school management was the help of the physical education teacher in matters of safety, dosage of physical exertion, consultations on balanced and rational nutrition, etc. and access to material and technical support (open playground with horizontal bars, sports hall). School students gathered information about the basic



elements of this type of activity from the Internet and from the young people who had experience with such activities (classmates, Telegram channels).

The number of schoolchildren who started doing morning gymnastics also increased by 13.5%. Motor activity during breaks also improved. As for school student's fatigue and the quality of their sleep, positive changes were also recorded. At the end of the pedagogical observation, the duration of sleep in most schoolchildren increased to 7-7.5 hours, and the quality improved to 6 points.

## Conclusions

The positive impact of street workout on a balanced development of school students has been clarified. Street workout exercises stimulate school students to be active, help develop strength, endurance, flexibility and coordination of movements; contribute to a balanced physical development of participants, in particular, reducing the percentage of fat, increasing muscle mass, reducing the risk of heart disease and other chronic diseases. The workout system also affects a person's social development (finding many friends and like-minded people); reduces stress and improves mood; the moral and strong-willed qualities of the participants are actively manifested during competitions. This type of physical activity is free (for the exception of sports clubs), and available for everyone. In addition, street training contributes to the formation of positive attitudes towards physical activity and a healthy lifestyle in school students.

The measures developed to promote physical activity among school students through street workout have shown their effectiveness. At the end of the pedagogical observation, the percentage of high school students with high self-assessment of motor activity increased. The number of school students who began to regularly engage in physical activity, perform morning gymnastics and actively spend their leisure time also increased. Positive changes in the quality and duration of sleep of young people and a decrease in their fatigue during pedagogical observation were recorded.

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**SOCIĀLĀ PEDAGOĢIJA**  
*Social Pedagogy*

# DEVELOPING THE CONFLICTOLOGICAL COMPETENCE AMONG STUDENTS OF PROFESSIONAL AND TECHNICAL SCHOOL

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**Abstract.** *Conflict is an inevitable part of any interpersonal relations. Low conflictological competence among students, large amounts of anxiety and stress, significantly affect relations between peers, especially during the martial law in Ukraine. This is particularly relevant for the professional and technical schools.*

*Inability to resolve conflicts peacefully is one of the key reasons of the increased number of conflicts among students, which leads to more cases of violence and bullying in the educational environment.*

*Promoting tolerance, respect, support, decency, etc. is essential for teaching young people the crucial strategy for harmonious communication and coexistence in society.*

*The objective of the article is to define conflictological competence and analyse, how students of professional and technical schools imagine the conflicts prevalence and management in the educational institution. The authors present the results of the survey conducted among 200 students from four professional and technical schools in Khmelnytska oblast and the city of Khmelnytsky in 2023. The survey has demonstrated the challenges related to the low conflict competence of the students and their inability to manage conflicts without using violence.*

*Based on the survey results, the authors focus on the need for the implementation of the safe educational environments program aimed at combating bullying and violence through the restorative practices, and developing conflictological competence of students of professional and technical schools.*

**Keywords:** *conflict, conflictological competence, bullying, restorative practices, professional and technical school.*

## Introduction

Conflictological competence is an important aspect of the professional training for the students of professional and technical schools. Conflict competence includes the ability to recognize, analyse and resolve conflicts in different areas of life, including work and educational environments.

The difficult situation in Ukraine, due to the full-scale invasion of Russian troops, has fundamentally changed the usual way of life of Ukrainian men and women. Increased anxiety caused by current events in the country affects the

emotional state of the population, an increased level of stress, irritability, aggressive behavior, etc. is observed (Liakh, Spirina, Klishevich, 2022).

In this regard, the topic of psychological, social and emotional support for teenagers who are experiencing stress from military events, from changing cities, schools, losing a circle of friends and loved ones, becomes even more relevant (Zhuravel, 2022).

In the present climate, an effective communication and conflict management requires the promotion of a culture of mutual understanding and tolerance in education; developing the skills and abilities to manage conflicts without violence and interact effectively with other actors of educational environment.

The conflictological competence of the students entails a number of joint actions by all actors of the educational environment, aimed at preventing and countering all forms of violence and bullying in school, finding new solutions for building a safe educational environment, through the restorative practices in particular.

*The objective of the article* is to analyse define the concept of conflictological competence and how students of professional and technical schools imagine the conflicts prevalence and management in the educational institution.

### **The problem of the research and academic orientation**

Recently, the trend of violence and manifestations of bullying (harassment) in educational institutions is increasing. This situation is associated with many factors, but the main ones are discrimination among children and aggressiveness (Bondar, 2024).

Many scholars study conflictological competence by studying the theoretical aspects of conflicts, developing methodologies for their resolution, and studying the practical aspects of communication and conflict management skills.

Conflict competence is one of the key professional competences (aside from methodological, personal, emotional and motivational, practical, communication, social interaction etc.) (Mukhina, 2019).

Foreign researchers K. Runde define conflict competence as the ability to develop and use cognitive, emotional, and behavioural skills that enhance productive outcomes of conflict while reducing the likelihood of escalation or harm (Runde, 2010).

Currently, the terms "conflict competence" and "conflictological competence" are used both in conflictology, and there are active discussions about the difference between them and the necessity to understand it. S.S. Fil in her article compared these two definitions used in the psychological literature and concluded that they are identical and very close in meaning (Fil, 2011)

I.V. Kozych believes that the concepts of conflict and conflictological competences should be distinguished, since the first one means the skills everyone

should be competent at and able to use in everyday life, while the second one appeals to the scientific background and has broader and deeper meaning (Kozych, 2008).

L.O. Yaroslav, in his research, concludes that the conflictological competence is a cognitive-regulatory substructure of professionalism of the individual and activity. It is a dynamic, structural-hierarchical formation, characterized by the possession of knowledge about the conflict and wide spectrum of conflict management strategies, emotional self-regulation, and personal abilities (like empathy, self-reflection etc.) (Yaroslav, 2009). Scientists argue the importance of developing the conflictological competence among students.

The main task of the employees of the educational institution, in addition to psycho-emotional support, is the development of conflict-related competences and the formation of the skills of constructive conflict resolution in the students of education (Kharkivska, 2023).

These are just few examples of scholars actively researching conflictological competence. The field of conflict studies is constantly evolving, and other scholars can make important contributions to this science.

### **Research methodology**

This article uses theoretical methods (analysis, systematization, generalization) to outline objectives, develop conflictological competence among students in challenging environment, and determine the level of conflict and types of responses to conflicts and their consequences; readiness of the students for the implementation of the safe educational environment programmes aimed at combating bullying and violence through restorative practices.

The article presents the results of the research and experimental work conducted in March 2023 by surveying students of professional and technical schools in Khmelnytskyi.

In their empirical study, the authors focused on the readiness of the students for the implementation of the safe educational environment programmes aimed at combating bullying and violence through restorative practices.

The survey covered 200 people from four professional and technical schools of the Khmelnytska oblast and the city of Khmelnytsky: Khmelnytsky Higher Professional School No. 4, Khmelnytsky Centre of Professional and Technical Education for the Service Industry, Krasilivsky Professional Lyceum, and Khmelnytsky Higher Professional School No. 25.

The survey included 15-19 years old students of selected professional and technical schools. Among them: 71 boys (35%), 129 girls (65%).

The survey took place in one oblast/region. It was important to study the atmosphere among the students in the group, the frequency of conflicts and the

consequences they cause, willingness to ask for help and interest in the implementation of programs aimed at preventing conflicts, bullying and violence through the restorative practices.

The authors used the report generation method to process the results of the survey (statistics of the answers to the selected questions).

### **Research results**

The presence of conflicts among students of professional and technical education indicates low conflictological competence and the inability to resolve conflict situations independently. In the future, this can result in more cases of violence and bullying. Based on the results of the study, the authors point out the necessity for developing the conflictological competence among students of professional and technical education.

Conflictological competence is the ability and readiness to combine theoretical knowledge of conflictology (cognitive component), practical abilities and skills to deal with the conflicts (operational component) and personal qualities that contribute to the best possible organization of productive interaction in conflict (personal component), for the conflict's prevention, regulation and resolution (Mishchenko, 2021).

The authors determine the readiness of the students for the implementation of the programs aimed at prevention of conflicts, bullying and violence in professional and technical schools.

According to the results of the above survey, conflicts most often occur between students, less often between students and the teaching staff or the school administration.

32 % of the respondents indicate that conflicts between students occur often, 41 % – sometimes, and 27 % - never occur. 22% of the respondents indicate that the conflicts between students and the teachers and/or the school administration occur often, 26% - sometimes, 52% - never.

21% of the respondents indicate that in their professional and technical school there were cases when conflicts resulted in fights or bodily injuries; 30% - insults, humiliation; 16% - isolation (ignoring) of some of the students, 23% - bullying, 10% - transfer of the student to another educational institution.

The above-mentioned results allow us to conclude that the conflicts in professional and technical schools often result in some form of violence and bullying.

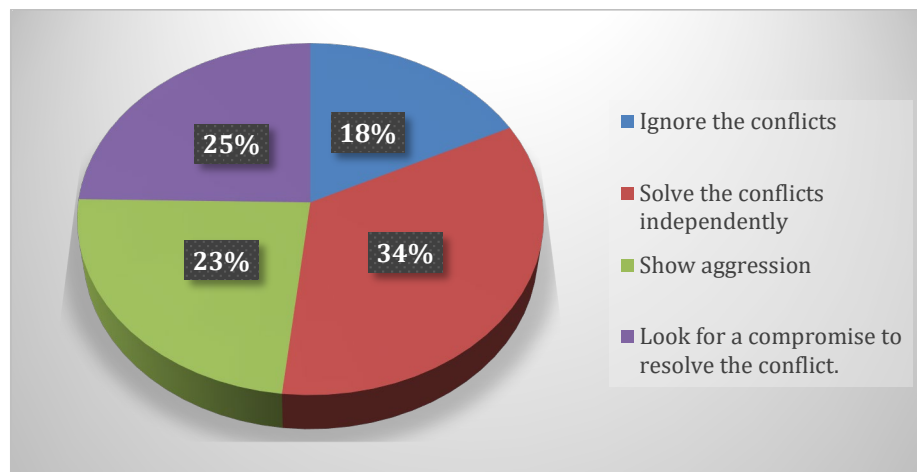
The Law of Ukraine "On Amendments to Certain Legislative Acts of Ukraine on Combating Bullying (harassment)" defines bullying (harassment) as actions of the actors of education environment, which include acts of psychological, physical, economic, sexual violence, including with the use of digital communication, committed against a minor or by a minor against other

actors of educational process, which resulted in causing or could result in causing damage to the mental and physical health of the victim (Verkhovna Rada of Ukraine, 2019).

Typical signs of bullying: systematic (repetitive) behaviour; presence of parties – offender (bully), victim (bullying victim), observers (if available). Bulling means actions or inaction of the offender, which resulted in harm to the mental and/or physical health, humiliation, fear, anxiety, subordination of the victim to the interests of the offender, and/or causing social isolation of the victim (Andrieienkova, Baidyk, Voitsyakh, Kalashnyk, 2020).

78% of the respondents indicate that during the conflict students face aggression and violence, 14% indicate that the conflicts lead to the destruction of relationships and 8% indicate that it contributes to the development of the relationships.

18% of respondents say that they ignore the conflicts, 34% solve the conflicts independently, 23% show aggression and 25% look for a compromise to resolve the conflict. (*Figure 1.*)



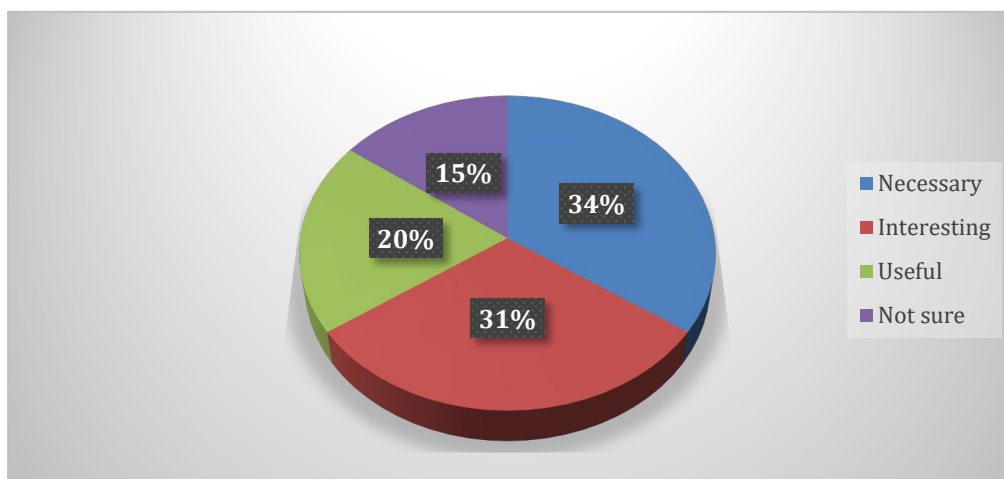
*Figure 1 Actions of students of vocational and technical education in the event of a conflict (made by authors)*

An interesting observation is that those respondents who indicated about solving the conflict situation independently also chose the option, "I can show aggression."

It was important for us to determine the level of readiness of professional and technical schools' students to the implementation of the safe educational environment programme aimed at combating bullying and violence through the restorative practices.

Therefore, 34% indicate that such a program is necessary in their school; 31% find it interesting; 20% say that such program seems useful, and 15% are not sure whether the programme is worth implementing in professional and technical schools. (*Figure 2.*)





*Figure 2 The opinion of students regarding the implementation of the Program for the implementation of restorative practices in their educational institution (made by authors)*

## Discussion

The results of the research presented in the article justify the need for an integrated study of conflictological competence among students of professional and technical schools.

The high conflict competence is especially important for youth, since this age group is characterized by an increased tendency to conflicts. This is caused by changes in socioeconomic status and age characteristics (Kutas, 2016).

Based on the results of the research presented in the article, we would like to point out that it is important to develop a sufficient level of conflictological competence among students of professional and technical schools, which will allow them to prevent conflicts and be able to resolve them peacefully. Moreover, the skills of peaceful conflicts resolution minimize the negative consequences of the conflicts due to non-violent resolution methods.

Since the low level of conflictological competence among students of professional and technical schools can have a negative impact on their future professional activity, it is important to promote the implementation of programs for the prevention of conflicts, violence and bullying in the first years of studying.

The ability to resolve conflicts constructively is a necessary condition and an important component of the educational process. The development of the conflictological competence of the professional and technical school students should be based on the following principles:

- better knowledge of conflict theory, psychology of communication, pedagogical psychology;
- mastering the skills of prevention, management, minimization of destructive forms of a conflict;

- development of the professional mindset, which includes ability for self-reflection, methodology, creativity, flexibility;
- strengthening personal resistance to stress in conflicts, ability to not be afraid of conflicts;
- adherence to professional ethics in conflict, high level of personal culture (Kaidalova et al., 2019).

Ability to solve conflicts peacefully requires from students to master the skills of conflictological competence.

Having analysed the existing educational programs, the authors focus their attention on the implemented programs "Peaceful conflicts resolution. Basic skills of mediation".

The purpose of the program is to create environment for the development of the civic and social competences of students, which involves development of the conflictological competence, skills and abilities to resolve conflicts peacefully, non-violent behaviour and civil position.

The programme "Peaceful conflicts resolution. Basic skills of mediation" is based on the idea that it is important to for the students to develop ability to effectively resolve conflicts, tolerate the opinions different from them owns, resist violence, bullying, discrimination in the group, take responsibility for building peace, respect equal rights for men/boys and women/girls.

Therefore, the conceptual idea of the Program involves the development of students' ability to resolve conflicts peacefully, to be guided by universal human values in communicating with others, promoting the ideas of peacebuilding and mediation (Andrieienkova, Levchenko, Matviychuk, 2018).

In the present climate of war in Ukraine, building a safe educational space based on the principles of a restorative approach has become extremely urgent. Modern educational institutions play an important role in promoting non-violent behaviour among students, particularly developing attitudes and skills essential for prevention of violence, establishing constructive communication, peaceful conflicts resolution, achieving understanding and cooperation on the way to establishing peace and its further development. (Andrieienkova et al., 2023)

It is important to note that in the educational process, mediation can be widely used not only to resolve individual interpersonal disputes, conflicts between individual participants of the educational process. (Kos'mina, Lyutyy, 2022)

The development of conflictological competences among students of professional and technical schools will contribute to increasing the effectiveness of educational activities, as well as personal and professional communication and interaction with others. The high conflictological competence of the students allows them to reduce the number of conflicts in the educational environment and resolve conflicts constructively. Improvement of the relevant skills and abilities

is very important for the development of conflictological competence of the students.

### **Conclusions and proposals**

Our study demonstrates the extreme relevance and importance of the development of conflictological competence among students of professional and technical schools for the educational process. However, the implementation of the program for the prevention of conflicts, bullying and violence needs attention and promotion in the educational institutions, specifically professional and technical schools. The actors of the educational process are aware of the importance and significance of this program, and understand that the development of conflictological competence in professional and technical schools should focus on social and state values.

The strategy for the development of the conflictological competence among students of professional and technical schools is necessary to ensure effective interaction in the group and create a safe educational environment.

We strongly believe, that the development of conflictological competence should focus on basic theory of conflictological study; introduction of the basic principles of peacebuilding and the concept of "violence", its types; mastering skills for resisting and combating bullying; promoting the importance of the students participation in the peacebuilding and peaceful conflicts resolution.

The topic of conflictological competence among students of professional and technical schools requires further study.

### **Acknowledgement**

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## **PARTICIPATION OF ROMA PUPILS IN NON-FORMAL EDUCATION IN LITHUANIA**

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**Abstract.** While Lithuania has made significant progress in integrating Roma pupils into the education system, real changes are still insufficient and require attention to the participation of Roma pupils in non-formal education. The aim of this paper is to highlight the opportunities and limitations of Roma pupils' participation in non-formal education. Semi-structured interviews were used to collect qualitative data. The participants in the study included 11 parents of Roma pupils, 8 school social pedagogues, and 3 workers from NGOs. Content analysis was conducted. Roma parents relate the benefits of non-formal education to children's meaningful leisure time, the development of skills necessary for a successful future, and the improvement of health. Parents face problems related to the accessibility and financing of non-formal education for pupils with special needs. Social pedagogues observe the involvement of primary school Roma pupils in events, various sports, or art groups. However, teenagers tend not to participate in non-formal education at school. Teenagers engage in non-formal education outside of school when events or sports activities are financed by sponsors rather than the family budget. Recognition of the contribution of NGOs in supporting and involving Roma pupils in non-formal education is crucial. This support is not only important for the promotion of Roma identity but also for strengthening the motivation of teenagers to attend school classes.

**Keywords:** parents of pupils, participation in non-formal education, Roma pupils, social pedagogues, workers of non-governmental organizations.

## **Introduction**

In recent years, European countries have focused on non-formal education, aiming to ensure that all groups in society, especially children, could acquire the competences necessary for future life and the creation of a democratic community. There is now a boom in non-formal education for children in Europe as more and more people and institutions recognise its value in today's dynamic and unpredictable society. However, it is noted that there is not enough focus on non-formal education, and that non-formal education experiences should be shared more widely (Bejko, 2023). There is a consensus that non-formal education promotes personal and collective development, has a progressive impact on disadvantaged and under-represented communities, and fosters intercultural understanding, tolerance, and mutual respect. The Council of Europe stresses that Roma children must have access to quality education and support, not only as a matter of children's rights but also as a strategic investment for countries to address their inclusion in education, thereby strengthening their potential to contribute to the creation of socially inclusive and sustainable societies (Buces, 2023). In Lithuania, Roma inclusion is carried out in accordance with international obligations under the Framework Convention for the Protection of National Minorities (Council of Europe, 1995) and other international conventions and treaties. Also, in 2020, the European Commission presented the EU Strategic Plan for Roma Equality, Inclusion, and Participation 2020-2030, which calls on EU countries to develop national strategic plans for integration that address the needs of Roma, including in education (The Council of the Europe Union, 2021; Ministry of Education, Science and Sport, 2021). Lithuanian researchers (Jevsejevienė, Survutaitė, Šetkus, & Zablackė, 2022; Žemaitėlytė-Ivanavičė, 2018; Račkauskaitė, 2017) analysed the compatibility of local Roma integration measures with the Action Plan for the Integration of Roma into Lithuanian Society 2015-2020 (Ministry of Culture of the Republic of Lithuania, 2015) and the Council of Europe recommendations on effective Roma integration measures in member states (Council of Europe, 2013), and analysed aspects of exclusion and levelling. D. Survutaitė (2023), based on the experience of teachers, analysed the difficulties of Roma children's education in schools and formulated solutions to overcome the challenges in order to ensure the quality of education. However, there is a lack of research and data on the participation of Roma pupils in non-formal education. An increasing number of Roma pupils are involved in non-formal education activities in day-care centres or other organisations in Lithuanian cities, but their participation is not as high as that of Lithuanian pupils and therefore requires further studies and discussions.

The aim of this paper is to highlight the opportunities and limitations of Roma pupils' participation in non-formal education. The paper seeks to answer the question - How do Roma parents, school social pedagogues, and non-

governmental organizations (NGO) workers explain the opportunities and limitations of Roma pupils' participation in non-formal education, based on their own experiences?

### **Opportunities for Roma children in non-formal education**

The Lithuanian Ministry of Education, Science, and Sport aims to provide non-formal education to children of national minorities (including Roma) to enable them to develop their national, ethnic, and linguistic identity, learn their mother tongue, history, and culture. After school hours, pupils can freely choose various non-formal education activities provided in general schools. Most of these activities are free of charge or paid for by the pupil's educational voucher, established in 2015. Pupils can also attend classes at various non-formal education schools, such as sports, music, fine arts, or art schools, leisure centres, or children's clubs. Classes are partially subsidized, and fees are determined by the founder (Ministry of Education, Science and Sport, 2021). Lithuanian researchers (Kontvainė, 2016; Petrušauskaitė, 2014), while analyzing the cooperation between Roma communities and municipalities in implementing the Action Plan for the Integration of Roma into Lithuanian Society 2015-2020 (Ministry of Culture of the Republic of Lithuania, 2015), drew attention to ensuring opportunities for Roma pupils to participate in the education system. The early withdrawal of Roma pupils from the education system, including non-formal education programmes, has been noted. Although the participation of Roma in the Lithuanian education system is improving, their level of education still significantly lags behind the general achievement indicators of schoolchildren in the country and is insufficient. There is still a tendency among Roma pupils to complete only grades 7-8 of compulsory education and to drop out of school and the non-formal education process (Department of National Minorities, 2022). In recent years, many municipalities with a large Roma diaspora have paid particular attention to the inclusion and retention of Roma pupils in the education system, as well as in extracurricular, leisure-time activities (Leonaitė et al., 2022). All municipalities in Lithuania are responsible for Roma children's education, healthcare, social welfare, and local cultural centres (Roma Community Center, 2019). The municipality of Vilnius stands out from other Lithuanian municipalities in consolidating the efforts of schools to ensure that Roma children experience the benefits of education, including non-formal education. It is one of the first municipalities in Lithuania to systematically address the welfare and education of Roma children and families. Roma Community Center (2019) notes that the municipality of Vilnius has actively implemented the first Roma integration strategies, which explains why this municipality was chosen for the study.

## **Methodology**

A qualitative study was undertaken by collecting data through a semi-structured interview method. The primary objective of the qualitative interview process is to gather data that reflects the perspective of the participants and elucidates the purpose of the study (Gaižauskaitė & Valavičienė, 2016). Throughout the interviews, the researcher explored the understanding, attitudes, experiences, motives, and feelings of the study participants. The structure of the semi-structured questionnaire is flexible, enabling the researcher to manage the interview process by altering the wording of questions, the flow of questions, and asking additional questions as necessary. The study comprised eight individual interviews with social pedagogues in different schools in Vilnius, eleven interviews with Roma people (parents) raising school-age children, and three interviews with (NGO) workers who have been working with Roma pupils in recent years. The interviews were transcribed. The interview data were coded as follows: T - parents of Roma pupils; SP - social pedagogues; NGO - NGO workers. The data collected in the study are analysed using Content Analysis. The text analysed was obtained through semi-structured interviews. The texts were read several times, and subcategories and main categories were distinguished. The study was conducted in accordance with the principles of study ethics: voluntary participation, confidentiality, and anonymity. Limitations of the study include that it was conducted within the boundaries of Vilnius City municipality, so the results of the study reflect the situation of Roma children's participation in the education system in Vilnius City. The results presented in the paper are part of the study on the participation of Roma children in the education system in Vilnius, funded by the Vilnius City Council (No. 2ST-5 (17.19 E-451)).

## **Results**

### **What are the experiences of Roma parents regarding their children's participation in non-formal education?**

The content analysis of interviews with parents of Roma pupils highlighted the following categories: Benefits of non-formal education for pupils: enrichment of pupils' time, development of skills for future life, improvement of health; Limitations to participation in non-formal education: high cost and accessibility of non-formal education activities, lack of activities for pupils with special needs; Factors that encourage pupils to participate in non-formal education activities: pupils' enjoyment of the activity, rewards, attention from educators, positive relationship with the trainer.

Parents of Roma pupils recognise the benefits of non-formal education in terms of their children spending their time in a meaningful way, developing skills needed for future life, and strengthening their physical and emotional health:



*"Good, different activities work well for him. Developing <...> enjoyment in doing them, maybe useful in the future"(T4). "Well, it's important for me that my girl participates in Roma concerts; she will learn and be able to teach other children something different..."(T7). According to the parents, sports activities in non-formal education clubs strengthened not only the child's physical health but also their motivation to participate in physical education classes at school: "The club was very successful - the child became stronger, the posture changed. For example, my schoolboy didn't do anything in physical education classes, he didn't do much, not even basic squats, or something like running, kicking a ball. He didn't really have those skills, and I avoided such activities. Now the change is happening; he is trying to participate in those classes and he is doing quite well" (T3). Limitations that parents of Roma pupils face in allowing their children to participate in non-formal education outside of school include the cost of these activities, the problem of accessibility, and the lack of activities for children with special needs: "There is nothing close to my home. I found it close but terribly expensive. It's not really possible for a child to take part because dancing takes up a lot of our family budget" (T5). One of the difficulties parents face when sending their children to non-formal education is geographical accessibility: "Then he wanted an art club, but I was looking for a place where it would be convenient for him to go himself, so I wouldn't have to go back to the city, take him, wait. I couldn't find it at first..."(T3). Parents experience a lack of non-formal education activities for children with special needs: "We can't find anyone who works with these children. We wanted to take our child to the swimming pool, and as far as we looked, they don't work with special children. It's hard to find; then we wanted to get gymnastics... but when they hear about a special child they say they haven't got a group <...> they say straight out that they don't work with special children. It's very difficult to find activities. And privately, of course, somewhere.... but that costs money too. So, I say, if the parents don't have the opportunity, the child doesn't get anything" (T6). Parents were happy to talk about the attractiveness of non-formal education activities for their children and their children's willingness to participate: "They would probably try all the clubs if they could. I think a child is hungry for excitement and entertainment, I would say. That is probably what he is now, that he wants everything and a lot"(T3), "She used to go to karate, she used to like it a lot"(T9). What motivates the children is a good relationship with the trainer: "Well, the child likes it very much, he really likes the trainer very much"(T7), " <...> because of the good relationship with the wrestling trainer, she also goes to wrestling twice a week"(T1). It is important for children participating in non-formal education activities to receive individual attention: "He likes it when attention is given to him, when it is explained to him, when he is communicated with, then he wants to go to that activity. He likes to be listened to, he likes to talk a lot and if he's not listened to, if he's not praised or whatever, that's it, he stops participating"(T4). Children are motivated to*

participate in non-formal education activities through achievements and awards: *"So far, she has been wrestling, taking part in competitions, and has a pile of medals at home"*(T1).

### **What are the experiences of social pedagogues regarding the participation of pupils in non-formal education?**

The analysis of interviews with school social pedagogues identified the following categories: active participation of primary school pupils in school events and after-school activities; avoidance of school events and after-school activities by secondary school pupils; participation of pupils in non-formal education activities inside and outside school is encouraged by meeting individual pupils' needs and by reimbursing financial costs.

School social pedagogues observe that Roma pupils in primary school are more actively involved in non-formal education activities or programmes than Roma pupils in upper grades: *"Primary school pupils, of course, have dances, they are in choirs at their school. We have an extra group for computer science, some of them attend, they like it, they like it. Well, you know, yes, and when we have events, concerts, they are really involved, they participate, they sing"*(SP1). Roma pupils in the upper classes only participate in school activities during lessons or breaks but avoid participating in non-formal education activities after school: *"If you invite pupils somewhere, they always ask if it is after or instead of classes. If it's after classes, it's not, but if it's instead, then yes"*(SP2). *"Teenagers don't want to go at all"*(SP4). Roma pupils go on school-organised educational excursions, with the school administration finding a way to pay for the travel costs: *"If there is an excursion organised, the child always goes on it, even if it is paid. It's usually the principal who finds some possibilities and pays for it"*(SP5). Social pedagogues help pupils to identify their individual interests and hobbies, motivate them to take part in different sporting activities, and find sponsors to fund the activity if it takes place outside school: *"I helped one of them through sport, he likes football and they didn't have the money. I contacted the president of the football association of that football, I asked him that there is a child, he wants to play football, but the family has no possibility to sponsor him, they have no money, I asked him what the possibility is to accept"*(SP3). However, *"...and the youngsters get, the less they participate in non-formal education clubs or groups"*(SP8).

### **What are the experiences of NGO workers regarding children's participation in non-formal education?**

The NGOs' workers who participated in the study identified one of the key areas of activity as supporting and enabling Roma pupils' participation in non-formal education in every possible way: *"Participation in competitions is paid, travel is paid, staying there is paid. But we can provide such support if they are visitors to our centre"*(NGO1). They involve pupils in the organisation of activities, motivating them to take an interest in the history of the Roma people,

to value Roma traditions, to learn about the cultures of other countries and to gain new and valuable experiences. The NGO workers see non-formal education as a tool to motivate pupils, especially in the older classes, to go to school and learn: *"We buy all the materials, we pay for the competitions, but on the condition that we help and look for support if they go to school <...> what can we promise, you will come here, you will have lessons, you will participate in non-formal education, you will go to practice, you will play the guitar <...> and then there you will read, you will write - we will go on a trip in the summer"*(NGO3).

Non-formal education in the NGO is based on an equal relationship with the pupils: *"I think that non-formal education is our strength, which is very suitable for Roma children, not in the sense of being directive, but in the sense of being equal. So that kind of communication, that we don't forget each other and friendship and equality, I think that's also very helpful"*(NGO2). NGOs organise activities to preserve Roma identity and broaden the horizons of Roma pupils. Activities for Roma pupils are organised in a targeted way to preserve Roma identity, through trips and activities that stimulate interest in Roma history: *"It's about identity, so we've been very interested in this topic for a few years now, trying to get them interested in history <...> I mean how to preserve their memory, their identity, how to preserve everything"*(NGO2). Non-formal education aims to promote Roma traditions: *"Roma dances <...> and what we really see already is that some of the young people are ashamed to dance them and that it is a shame to wear these traditional Roma costumes. That is also something that we encourage very much. That's the most important thing, so that they don't turn away and are not ashamed to be Roma and to keep their traditions"*(NGO3). Non-formal education contributes to the preservation of the Roma language: *"In the spring, we organised a trip for pupils and the Roma we met told us how important it is to preserve their language and how important it is to speak it. And then <...> and they were really proud of their identity"*(NGO1). Non-formal education is seen as a means of promoting knowledge of the cultures and traditions of other countries: *"...pupils don't travel and have very little experience or exposure to other places. Give a person an idea of what he wants, but he hasn't seen what it could be like, he doesn't know what it was like, and he has a very narrow world of knowledge, he hasn't been anywhere, he hasn't seen anything. Non-formal education gives you new experiences. It gives them the experience that they can spend their free time in a different way because, well, really"*(NGO3).

## Discussion

In order to strengthen the inclusion of Roma pupils in non-formal education, it is important to focus on providing opportunities and reducing the limitations experienced by pupils and their parents. Lithuanian education legislation stipulates that every school in the country should be allocated the necessary funds

to implement non-formal education for pupils (Survutaitė, 2023). Compulsory education is complemented and supplemented by non-formal education activities, which pupils are free to choose within the school environment, but access for Roma pupils is still not guaranteed. It is recognised that involvement in non-formal education engages Roma pupils and promotes their progress at school (Survutaitė, 2023), and this is confirmed by the parents of Roma pupils, social pedagogues, and NGO workers who participated in this study. Primary school pupils take part in school sports and arts activities because they are easily accessible, free, engaging, useful, promote physical health, and socialisation. However, Lithuanian researchers (Jevsejevienė et. al., 2022) observe that ethnic minority pupils at primary school level participate in non-formal education activities at school, but that participation decreases in the older group of pupils.

The social pedagogues participating in this study also noted that it is difficult to involve older Roma pupils in non-formal education at school or in after-school activities. On the other hand, when social pedagogues identify the individual interests and hobbies of pupils and find sponsors to pay for various sports, art activities, and educational trips, the motivation of young people to engage in non-formal education outside school increases. Social pedagogues recognise the importance of mobilising the school community to ensure the successful integration of Roma pupils by organising inclusive non-formal education events at school on topics related to different cultures and customs. The results of the study show the contribution of NGOs in providing social and educational support to Roma pupils and their families, and in finding opportunities for pupils to access non-formal education services in day-care centres and other non-formal education organisations in the municipality. This becomes a strong argument to motivate Roma teenagers who have learning difficulties and avoid attending classes to make progress in their education and complete the basic education programme up to grade 10. However, it is still observed that there is a tendency among Roma to complete only grades 7-8 of compulsory education (Department of National Minorities, 2022). For example, non-formal education in schools could be closely linked to non-formal education out of school, where schools, NGOs, and other organisations involved in non-formal education in the municipality could work together to create a broad network of non-formal education services in multicultural settings, enabling Roma pupils, especially those who are excluded, to integrate seamlessly into the education system. It should be noted that in the education of Roma pupils, socially just education is achieved by recognising cultural diversity, increasing access to education, including non-formal education, supporting Roma inclusion and socialisation, and building a positive image of minority cultures (Carrera, Rostas, & Vosyliūtė, 2017). This study has highlighted the limitations that hinder the access of Roma pupils with special educational needs to non-formal education services. Parents noted that their children with special educational needs do not have access to non-formal education activities

close to home or at school, or that the cost of the activities is too high and cannot be financed from the family budget. Parents find it difficult to find a non-formal education teacher or trainer who is willing to personalise or adapt a programme of activities for a child with special needs. For some Roma children, special educational needs due to health problems or disabilities become apparent in primary education. In such cases, the general education curriculum is adapted and individualised, taking into account the identified special educational needs of the pupil, as well as the wishes of the pupil and the parents, and in accordance with the findings and recommendations of the Educational Psychological Service (Survutaitè, 2023), while non-formal education is left to self-development or within the scope of the parents' possibilities and interests. Knowing this, it is possible to develop potential school opportunities to link formal and non-formal education beyond the school environment.

### **Conclusions**

Schools, NGOs, and other non-formal education institutions are working to ensure that Roma pupils have access to non-formal education. Ensuring pupils' participation in non-formal education in the long term is linked to the diversity and coordination of educational activities within the school, cooperation with a network of non-formal education organisations outside the school with a multicultural background. This collaboration aims to help Roma pupils overcome the difficulties they face in life and in the learning process, socialise, and integrate into the education system. Parents of Roma pupils recognise the benefits of non-formal education and associate it with the development of skills needed for their children's future success. However, they experience limitations or a lack of availability of non-formal education for children with special needs, issues related to the accessibility of services, and the possibility of financing it from the family budget. School social pedagogues strive to ensure that Roma pupils in primary school have the opportunity to participate in non-formal education activities or programmes in the school environment. However, teenagers tend not to be involved in non-formal education in school. The motivation of teenagers to participate in out-of-school non-formal education activities is increased by identifying the individual needs of the pupil and finding sponsors. NGO workers not only support and involve Roma children in non-formal education activities but also have the ability to enhance their motivation to attend school and integrate into the education system in the long term.

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# EMPOWERING PSYCHOLOGICALLY TRAUMATISED CHILDREN AT SCHOOL: THE EXPERIENCE OF SOCIAL PEDAGOGUES

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**Abstract.** *The aim of the study is to reveal the experience of social pedagogues in empowering psychologically traumatised children at school. Qualitative research was chosen for the study by using the method of semi-structured interview. 10 social pedagogues, who work in school in different Lithuanian regions, participated in the study.*

*The study revealed the experience of social pedagogues in empowering traumatised children in school. The study highlighted that in empowering children who have experienced psychological trauma, it is first of all important for the social pedagogue to show the child individual care and provide him with the necessary support. Ensuring that the child receives emotional support and counselling, if necessary using the services of a psychotherapist or psychologist. It is also important to work with the child's family to understand the family's needs and capacity to provide the necessary support. Provide the family with practical help and advice on how to cope with the child's trauma and stress. In order to empower children, it is important to allow them to participate in decision-making because then children will feel in control of their own lives. Empowering psychologically traumatised children requires providing them with a safe and stable environment where they can feel calm and have their needs met. It is equally important that traumatised children become involved in classroom activities or social groups at school, to build relationships and receive support from the school community. Social educators emphasise the importance of educational activities in the school community to help children develop their skills and talents. Long-term collaboration to empower children and their families ensures sustainable well-being of society.*

**Keywords:** *child, empowerment, school, social pedagogues.*

## Introduction

Empowerment is a process encompassing the enhancement of an individual, community, or social group's abilities to actively engage and control their own lives. Aertsen, Bolivar, Mesmaecker, Lauwers (2011, p. 10) It denotes that “empowerment is a phenomenon in which people, organisations, and communities address the issues that concern them.” Various disciplines in the field of social sciences, including education, sociology, economics, management, political science, and others, use the concept of empowerment. Education, sociology, economics, management, political science, etc. Vencloviene (2015,



p. 114) asserts that “in the field of education sciences, Michel Foucault extensively analysed power theories, with a key emphasis on power relations”. According to Ruškus, Mažeikienė, Naujanienė, Motiečienė, and Dvarionis (2013), Foucault was crucial for understanding not only how power operates but also how it can be resisted.

What is the relationship between power and empowerment? The empowerment issue is related to how power is conceptualised. Power is considered a fundamental element that constructs and structures society. This relationship can be twofold, depending on the chosen perspective towards power. Kreisberg (1992) explains that power has two roots. The first is the fundamental expression – “power over,” meaning “above our heads.” This type of power is accompanied by a lack of trust and respect. It is associated with the lower feeling of fear when a person lacks self-confidence and feels inferior to others. The second expression is opposite to the first understanding of power. Power is understood as “power with,” having an expression of empowerment within itself. “Understanding the phenomena of power and empowerment is possible only by recognising their expression at macro, meso, and micro levels, clarifying how power and the exercise of power are related to societal structures and the functioning of society” (Ruškus, Mažeikienė et al., 2013, p. 10).

It is particularly important to empower children who have experienced trauma. Liutkevičienė (2015, p. 129) notes that “it is important to strengthen the sense of personal responsibility and help discover opportunities to act by giving the individual uniqueness.” Children must understand that they make decisions about their actions and life events, they decide for themselves, aligning their decisions with those of others, and “self-confidence is important in overcoming difficulties and obstacles” (Gudžinskienė et al., 2017, p. 167). According to Liutkevičienė (2015, p. 120), based on the empowerment theory, “children need to be given the opportunity to freely make decisions and thus reduce their vulnerability,” and decision-making methods cannot be imposed, freedom of choice must be granted. Venclovienė (2015, p. 116) notes that this is “closely related to psychosocial categories of human beings: self-control, perceived competence, self-esteem, self-confidence, and recognition of one's strengths”. Psychological trauma (also known as mental trauma, psychiatric trauma, or psychotrauma) is an emotional response caused by severe distressing events that are outside the normal range of human experiences, with extreme examples being violence, rape, or a terrorist attack (Barros, Assar, Botto, Leighton, Quevedo & Jiménez (2022)).

In Lithuania, there is an increasing number of studies on the possibilities of empowerment, however, there is a lack of scientifically grounded data on the empowerment possibilities of children who have experienced trauma in general education schools. Therefore, research related to the empowerment of psychologically traumatised children is relevant and timely. The aim of the study

is to reveal the experience of social pedagogues in empowering psychologically traumatized children at school. The article is based on qualitative study by interviewing social pedagogues about empowering traumatized children at school.

### **Research methodology**

Qualitative research was chosen for the study by using the method of semi-structured interview. The semi-structured interview enables to move closer to the perception of human experiences, the identification of meanings, the definition of situations and the interpretation of reality (Bogdan & Biklen, 2007). The study used mixed purposive sampling of study participants. In particular, convenience, when the sample is drawn from the most easily accessible unit, in cooperation with one of the schools of big cities in Lithuania. Snowball sampling has also been used (George, 2023). The sample units were selected from people who were recommended by other research participants as individuals who have experience, knowledge, and information about the topic of the research. The main criterion is that the participants of the study should have worked as social pedagogues for at least 5 years. Participants of the research was 10 social pedagogues, who work in schools in different Lithuanian regions with psychologically traumatized children. The research participants are women aged between 29 and 49 years. All interviews took place in the school premises during or before work. The research was conducted in 2023. The number of interviews is defined based on the principle of saturation, when the information provided by the research participants begins to repeat itself. Analyzing the research data was based on the qualitative data analysis steps outlined by George (2023). In the context of this article, we use content analysis as a research method for the subjective interpretation of the content of data. The study was based on the respect for personal privacy and confidentiality. The participants of the study participated voluntarily. They were briefed on the purpose and the use of the study. Study participants were assigned a code by using the letters 'A, B, C' and so on.

### **Research results**

The research shows that social educators can empower children who have experienced psychological trauma: by taking an interest in the child, providing them with the necessary support, relieving tension after the psychological trauma, organising the services of a psychologist or psychotherapist, working with the family of the traumatised child, creating a safe environment for traumatised children, enabling traumatised children to participate in decision-making, and building the self-confidence of psychologically traumatised children (Table 1).

**Table 1 Empowering Psychologically Traumatized Children At School**  
(made by Authors)

Showing interest in the child	<b>Engaging in active listening.</b>
	Communicating empathetically
	Encouraging the child by highlighting their successes
	Identifying and understanding the child's important personal goals and aspirations
Providing necessary assistance to the child	Organising interesting and appealing educational activities
	Offering support to the child in problem-solving
	Assisting the child in achieving their goals
Reducing tension after an injury	Supporting the child in overcoming learning difficulties
	Teaching relaxation techniques
	Encouraging participation in sports activities
Organising the services of a psychologist or psychotherapist	Involving children in artistic expression activities
	Proposing specialised psychological services
Working with the child's family	Mediating in obtaining psychotherapeutic services
	Collaborating with the child's family to understand the family's needs and possibilities to provide necessary assistance
Creating a safe environment for traumatised children	Providing emotional support to the family and the child
	Establishing a safe environment in the classroom
Creating conditions for traumatised children to participate in decision-making	Ensuring a safe environment in the school
	Organising class meetings
Fostering self-confidence in children who have experienced trauma	Facilitating open dialogue and transparency in decision-making
	Involving children in class and school activities
	Highlighting the strengths of the child
	Providing support and motivation to the child

Analysing the research data was found that social educators make efforts to empower psychologically traumatised children in various ways. Recognising the importance of empowering practices, research participants emphasised that **showing interest in the child** primarily manifests through *active listening*: “we ask children what they like, discuss their hobbies, dreams, experiences...” (C); “We show attention by listening to the child and answering their questions” (E). When a child is sad, angry, fearful, facing a problem, or is very tired, it is crucial to demonstrate that they are heard, and efforts are made to understand them and their emotions. The study revealed that *empathetic communication* with children who have experienced psychological trauma is another essential component of showing interest and empowering them. According to the survey participants: “we strive to be empathetic, reflect the child's feelings during the conversation, and are attentive to their experience.” (A); “We take into account each child's uniqueness, their strengths and weaknesses.” (J). Actively listening and

communicating effectively with the child mean verbally expressing how we understand the child's feelings. Most of the time, the child's problems are related to the experience of negative feelings, so through active listening and communication, social educators help the child to understand his/her feelings and show that they accept him/her with these feelings. Children who have experienced trauma need to feel successful and believe in their abilities (Nelsen, 2006). *Encouraging the child by highlighting their successes* is also a significant tool in empowering a child who has experienced psychological trauma. Social educators noted: "I notice and emphasise the child's efforts and successes, and encourage progress, however small" (G); "Whatever the child is doing, I focus on the successful moments, not on failures" (E). By constantly encouraging and showing that they believe in children's abilities, social educators build traumatised children's autonomy and confidence in their abilities, and they become independent in planning and implementing their activities. Latham (2007) asserts that the most effective way to help a child is to notice and encourage them more frequently. During interviews, social educators said that *clarifying and understanding the personal goals and aspirations that are important for children* is important for them when working with children who have experienced psychological trauma. According to the research participants: "In conversations, we try to understand and comprehend the child's important goals and aspirations, what is important to them in life." (D); "We create opportunities for the child to share their dreams, goals." (H). It is noteworthy that social educators, in seeking to understand and identify children's personal goals and aspirations, aim to develop social competence in children. Rubin and Burgess (2002) define social competence as the ability to achieve personal goals while interacting with others and maintaining positive relationships with them. *Social educators use various methods to engage children in educational activities*. The results of the research indicate that *organising interesting and appealing educational activities* also contributes to the empowerment of psychologically traumatised children. Research participants reported: "organising fun, stimulating activities" (I); "I organise learning activities through games, give creative tasks that children engage more actively in than in regular lessons; it's important to avoid boredom..." (B). Collaborative activities between social educators and children represent one of the most positive shared educational experiences. Children relax and play out experienced traumas, expressing negative emotions such as anxiety, anger, fear, and sadness. Games foster a child's creativity and enhance imagination. Bonneville-Baruchel (2015) emphasizes that play and games are a way for a child to explore the surrounding world, mitigating the consequences of mistakes and failures without adding unnecessary tension. Therefore, research results indicate that showing interest in children who have experienced psychological trauma is crucial in their empowerment process. According to Upton et al. (2003), a genuine

interest in a child opens the way to trust, positive relationships, and the development of a child's creativity.

Providing empowering services involves **giving necessary assistance to the child**. The needed help is provided by *supporting the child in problem-solving*. As mentioned by research participants: “helping to solve problems” (F); “we talk and explain what is most challenging for the child, and if I can, I help myself, or the class teacher helps, and if needed, we turn to specialists” (B). Typically, a problem is solved by defining it, coming up with as many possible solutions and potential consequences as possible, and then choosing the best solution. For social educators, it is important to initially allow the child to express their feelings and concerns about the problem and then assist in resolving it. Having learned to freely accept the child's ideas, discussing them together with children who have experienced trauma, social educators teach and empower children to independently solve problems. The research shows that in empowering children who have experienced psychological trauma, *providing support to the child in achieving their goals is also crucial*. This is illustrated by statements from research participants: “If a child is interested, for example, in football and wants to attend, then we find a club and a coach where he can participate, negotiate discounts, or even agree that the child can attend training for free” (D).

Experienced psychological traumas hinder the development and self-expression of a child's personality, but they can be successfully addressed by providing timely assistance. The successful support provided by social educators empowers children to pursue their goals. *Supporting the child to overcome learning difficulties*. Research participants indicated that conditions are created in schools for children to stay after classes and receive individual consultations, thus overcoming learning difficulties: “We create opportunities for children to stay after classes and consult with the teacher individually” (C); “taking into account the child's emotional state, assessments are organised individually” (E). Learning difficulties lead to lower interest in school, lower self-esteem, and lower academic achievement. They can only be compensated by knowing the most successful teaching methods (Raudeliūnaitė & Gudžinskienė, 2019). Depending on the child's emotional state, assessments can be postponed as long as the child's health requires. Children who have experienced trauma face learning challenges, and social educators help them by creating a suitable learning environment to realise their abilities in acquiring knowledge (Riviere, 2006). Thus, the research revealed that providing support in overcoming learning difficulties for children who have experienced psychological trauma helps achieve positive learning outcomes and boosts self-esteem.

Empowering psychologically traumatised children also involves **reducing tension after the experienced trauma**. The research showed that social educators strive to reduce tension in children who have experienced psychological trauma by *teaching them and their family members various relaxation techniques*:

“We help the child and his family learn relaxation exercises, such as breathing exercises, meditation, etc.” (J). In addition, to empower children who have experienced trauma, *educators use sports and artistic activities*. As mentioned by research participants, “We offer activities for children that help reduce tension and promote emotional relaxation, such as various sports clubs” (I); “some children prefer dancing over sports, so we encourage them to dance” (A). Children's engagement in artistic expression activities also helps them relax. Research participants noted: “Children who have experienced trauma relax by participating in art, graphics, and ceramics clubs.” (H); “in artistic expression activities, children forget and relax” (B). The application of art therapy methods to children to reduce their tension after experiencing trauma is emphasised by other scholars as well (Zhang, Wan, Iyendo, Apuke, & Tunca, 2023).

In the case of complex psychological traumas, **offering specialised psychologist or psychotherapist services is crucial**. Psychological traumas can affect a child's behaviour and psychological well-being. The research shows that *offering specialised psychologist services* is relevant for children and their families who have experienced trauma. Research participants reported: “we inform the family about specialised psychologist services, possible professional help, his consultation, or therapy...” (F). Additionally, *the mediation of social educators in obtaining psychotherapist services* is relevant: “we mediate if we see that the child would benefit from psychotherapist services” (G); “sometimes services for the child are needed from other organisations, such as psychotherapists providing assistance to children who have experienced trauma and their families. So if there is a need, we mediate, depending on the situation” (D). The research indicates that social educators respond sensitively and responsibly to situations involving a child's trauma, ensuring that professional help is provided promptly. Psychologists aim to identify children's mental disorders and assess the impact of experienced psychological trauma. According to Don Fontenelle (2002), when evaluating the impact of trauma on a child, it is necessary to consider their adaptive abilities, which manifest through the totality of disorder symptoms and have significance for the course and prognosis of the disorder.

**Working with the child's family** is crucial when dealing with traumatic experiences. The research revealed that *collaborating with the child's family to understand the family's needs and capacity to provide the necessary support* is an integral component of working with a child who has experienced trauma. This is illustrated by statements from research participants: “we constantly communicate with the child's family, share information about the child's progress, achievements, and potential” (I); “Together with parents, we discuss and strive to create an environment where the child feels supported and encouraged” (C). However, it is essential to note that each family is unique, and their needs may vary significantly. In all cases, the key is to demonstrate understanding, support,

readiness to collaborate, and provide assistance tailored to the individual needs of a specific case. If difficulties arise, seeking help from professionals who can offer qualified assistance is crucial. Importantly, when working with a family and a child who has experienced psychological trauma, the provision of support should be consistent, uninterrupted, and develop into long-term collaboration in the future. An essential factor in empowering a child who has experienced trauma is *providing emotional support to the family and the child*. According to the research participants: “Firstly, we aim to listen carefully and empathetically to the family, allowing them to share their feelings and experiences, including traumatic experiences... providing support” (A); “It is very important to show the family that we understand their difficulties, that we are ready to help, teach stress coping methods, and explain how stress can affect a child's development...” (D); “It is essential to set a positive mindset and be prepared for long-term family support and collaboration because the process takes time...” (G); “my experience shows that it is beneficial for families to maintain connections with other families who have faced similar challenges, as families can provide emotional support and share experiences” (B). These statements support the notion that the individual progress of the child is crucial to research participants, emphasising attention to the child's empowerment process. Thus, social educators recognise the importance of the empowerment process and do not focus solely on the desired outcome. The work of social educators with both the child and their family sets the groundwork for the successful overcoming of psychological trauma consequences. Joseph, Dickenson, McCall & Roga, (2023) indicated that the better results are achieved when the entire family is involved in the therapeutic process.

The research also revealed that **creating a safe environment** is crucial for children who have experienced trauma. First and foremost, it is crucial to establish *a safe environment in the classroom*. Participants in the research emphasised that “Children feel safe and comfortable when entering the classroom” (I); and “in the classroom, children feel good, without tension from classmates or teachers” (C); The simplicity and clarity of materials, including clear board notes, straightforward textbooks, clear assignments, and adaptive tools, were highlighted as important elements” (F); “Provide opportunities for students to complete tasks in a variety of ways of their choice” (H). Empowering psychologically traumatised children requires the creation of a secure and stable environment in the classroom where they feel safe and can meet their needs. This is facilitated by applying the principles of universal design. Implementing universal design principles in creating a safe environment means that the environment is suitable, accessible, and user-friendly for all individuals, regardless of their abilities, age, or disabilities. Consequently, an environment is developed that is favourable for all children in the school. Moreover, it is essential for a child to feel safe not only in the classroom but also in the broader *school*

*environment*. According to the research participants: “We strive to make the child feel safe and accepted, emphasising the importance of parent collaboration with the school and other institutions that can provide assistance and support for the child” (D); “We support the family and the child by creating structured routines and communication traditions, involving more people whom the child can trust...” (J). Milot, St-Laurent, & Éthier (2016) also emphasise the importance of a safe environment for a child who has experienced trauma.

Empowering traumatised children involves **creating conditions for them to participate in decision-making, which is a form of empowerment for children with psychological trauma**. One approach that class leaders can use is *organising class meetings*. As stated by research participants, “It is essential to regularly organise class meetings, creating opportunities for students to express their opinions, share thoughts, and exchange ideas” (E); “During meetings, class rules can be discussed, various projects planned, or relevant class issues addressed” (A). Thus, in a classroom environment where children know each other well, they can freely express their thoughts, share ideas, and engage in discussions. However, equally important is the *open dialogue and transparency in decision-making by social educators*. Participants emphasised that, to empower traumatised children: “It is crucial to be open, encouraging dialogue between teachers, students, and parents on important issues.” (I); “Occasionally, we organise discussions or forums that provide opportunities for children to participate in decision-making, which is important not only for psychologically traumatised children...” (F); “We strive to be open in decision-making, make them transparent, and ask all children to express their opinions” (B); “We listen to learners’ opinions before making relevant decisions...” (D). Other researchers (Bouma, Lopez, Knorth & Grietens, 2018) also highlight the importance of listening to the child when empowering them.

To **enhance the self-confidence of children who have experienced psychological trauma**, it is relevant to nurture their self-esteem. Educators make dedicated efforts to cultivate self-esteem in traumatised children by engaging them in various activities, emphasising their strengths, and motivating and supporting them. The research reveals that *educators employ diverse strategies to involve children in classroom and school activities*. This is illustrated by the thoughts of the participants in the research: “it is important that children who have experienced psychological trauma participate in school activities or social groups, establish connections, and receive support from the school community.” (G); “Involving traumatised children in various activities, active groups, and school councils, enabling them to represent decision-making, thereby gaining greater self-confidence” (E). The social pedagogues who took part in the research are aware that an equally important factor in a child's self-confidence is *highlighting the child's strengths*. Participants note: “I try to emphasise the child's strengths...” (A); “I tell the child that these are your talents, the skills you possess, in other



words, highlighting the child's strengths.” (H); “I strive to acknowledge the child's success in tasks where they feel accomplished” (I). *Supporting and motivating* the child is another crucial factor in building their self-confidence. Social educators express: “I patiently support, motivate, and help the child understand that they can experience success in activities they perform” (C); “to restore self-confidence in children, they need to be motivated.” (J); “Encourage, promote, and motivate by showing the child that they can” (D). Therefore, to empower children, it is essential to allow them to participate in decision-making, as this fosters a sense of control over their lives. Creating opportunities for children to participate in decision-making in school and class is vital because it promotes their activeness, a sense of responsibility, and the ability to communicate and collaborate. However, an inseparable factor in empowerment and participation in decision-making is encouraging and supporting the child's self-confidence by involving them in activities and highlighting their strengths. Titus & Muttungal (2023), highlighted that empowerment is as self-confidence and the ability to make independent decisions. It is crucial to provide psychologically traumatized children with the opportunity to actively engage in the life of the class and school, to be responsible contributors to their learning environment. This promotes their personal responsibility, self-confidence, develops communication and collaboration skills, and creates an inclusive community.

### **Conclusions**

The research reveals that in empowering psychologically traumatized children, social educators need to take an interest in the child by actively listening, engaging in empathetic communication, and highlighting the child's successes. Social educators show attention to the child who has experienced psychological trauma by understanding their personal goals and organising interesting and appealing educational activities. To empower traumatized children, social educators not only provide necessary assistance and support for problem-solving and achieving goals but also actively involve them in decision-making processes. In the process of educating children and their family members, social educators employ various relaxation techniques and encourage children to engage in sports and artistic self-expression activities, aiming to reduce the tension experienced by children after psychological trauma. In complex situations, social educators provide emotional support and counselling to the child, and when necessary, act as intermediaries to ensure access to the services of psychologists or psychotherapists. The research indicates that social educators understand that in the empowerment process of a psychologically traumatized child, work with the family is crucial. Thus, they collaborate with the child's family to comprehend the family's needs and capabilities to provide necessary assistance to the child. When needed, emotional support is extended to both the family and the child.

Empowering traumatised children requires the establishment of a safe and stable environment in the classroom and school. The research reveals that empowerment involves allowing children to participate in decision-making processes, fostering a sense of control over their lives. Organising class meetings and engaging in open dialogue during decision-making empower children to participate in school activities within the classroom or social groups. This helps them build connections and receive essential support from the school community. Encouraging children to actively participate in various school community activities empowers them to express themselves, recognise their strengths, and gain self-confidence. Providing support to the child and their family enables them to contribute to the sustainable well-being of society.

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## FEATURES OF PROVIDING SOCIAL SERVICES IN RURAL COMMUNITIES

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**Abstract.** *Given the potential territorial isolation, lack of necessary contacts, and social agencies, the current situation of a state of war highlights the problem of optimizing the provision of social services to vulnerable population groups in rural communities.*

*The aim of this article is to identify and characterize the features of providing social services in a rural community, determining the factors and environmental aspects that influence the content, forms, and methods of providing social services in a rural community.*

*The authors analyze and summarize approaches to defining the concept of "community" and grouping communities based on various characteristics of the social environment. The study identifies problems in rural society that may affect the process, types, and forms of providing social services (relatively high level of societal social control over individuals; limitations in the social integration opportunities of individuals into the social environment; limitations of social status and role positions in the socialization process; high probability of social exclusion; specific division of labor; limited social contacts; a small number of social institutions influencing the socialization process).*

*Throughout the research, the authors emphasize the need to focus social work in rural areas on supporting youth, young families, and youth initiatives. They outline types of social services to emphasize in rural communities, aimed at social prevention, social support, and social services. The study identifies factors influencing the process of providing social services in a rural community (seasonal, socio-historical, socio-pedagogical, socio-cultural, educational, socio-domestic, socio-demographic, socio-ethnic, socio-religious).*

*The authors see promising research directions in determining the satisfaction with the provision of social services in a rural community and identifying conditions for the effectiveness of providing social services in a rural community.*

**Keywords:** *community, environment, rural community, rural society, social services, territorial community.*

## **Introduction**

Rapid development of social relations today necessitates addressing the optimization of providing social services to vulnerable populations. This task becomes particularly relevant when it comes to rural communities, considering possible territorial isolation, a lack of necessary contacts and social agencies, and the current situation of a state of war. Unfortunately, the current social services system in Ukraine is not sufficiently effective, as procedural aspects require reform. Therefore, it becomes clear that many of these services can be obtained online, while others require reform and constructive changes.

These tasks are regulated by Ukrainian laws (Verhovna rada Ukraine, 2015; Verhovna rada Ukraine, 2019; Verhovna rada Ukraine, 2021), and they are actualized by the Cabinet of Ministers of Ukraine's decree to ensure European standards in the functioning of social protection institutions, provision of social services, financial stability of the social sector, increasing transparency, and optimizing administrative expenses (Cabinet of Ministry Ukraine, 2020) and the State Targeted Social Program for creating opportunities for self-realization and development of youth potential in Ukraine, their participation, and integration into public life (Cabinet of Ministry Ukraine, 2021). However, the situation of wartime in Ukraine has partially delayed the implementation of the tasks outlined in these provisions and programs.

The normative-legal framework for social work declares the necessity of ensuring European standards in the functioning of social protection institutions, provision of social services, financial stability of the social sector, increasing transparency, and optimizing actions.

The analysis and characterization of the peculiarities of providing social services in a rural community are relevant and provide an opportunity to identify factors and features of this environment with the aim of improving the content, forms, and methods of providing social services in rural communities.

## **Literature Review**

The issue of developing and providing effective social services is currently at the forefront of social work theory and practice, considered from various perspectives (Denysiuk et al., 2023). Researchers, while exploring the practice of social work with different recipients of social services in the local community, focus on analyzing new forms of relations between the public and private sectors in the local community, aimed at shaping the market for social services at the local level (Semygina, 2019). This includes the analysis of volunteer programs implemented by government and non-governmental organizations, providing social services to community members without financial compensation (Nabatchi et al., 2017), as well as the organization and provision of activities within the

community in the areas of social protection and children's rights protection (Vakulenko et al., 2005; Lapa, 2006). The organization of social-pedagogical work with children and youth in the local community is also emphasized (Bezpalko, 2006).

The exceptional role of educational institutions as socialization centers in rural communities is noteworthy. In particular, researcher O. Mezhirytskyi reveals the essence and content of the activity of rural schools as centers of social work, defining the conditions for the successful functioning of schools as cultural-educational centers of the village (Mezhirytskyi, 2003). In this context, the development of an inclusive educational environment for families raising children with disabilities and social support for such families are important (Spirina & Dorofina, 2023; Skrypnyk et al., 2021).

Researchers underline the necessity to consider the rights of service recipients to support from their immediate surroundings, the overall social environment; the right to make mistakes and self-determination, realization of their own abilities, and responsibility for their actions, decisions, and deeds (Zhukov et al., 2023).

Another aspect of researching this issue is the study of community needs for the implementation of civic initiatives and responding to challenges and social problems (Liakh & Spirina, 2021). Researchers emphasize that effective development of territorial communities requires active interaction and cooperation of all parties involved in social dialogue, especially the active participation of the public in making important decisions, managing various aspects of community life and activities, and developing a development strategy (Gunko et al., 2023). In this context, favorable factors that can influence the future implementation of social services, programs, and projects, including government-citizen relations (Burgess et al., 2023), play a crucial role. Researchers stress that public administration requires addressing new management processes by promoting greater citizen involvement in government activities (Bingham et al., 2005). This includes the use of citizen and stakeholder input to determine policy form, implementation, and ensuring compliance, including the needs of rural communities in providing quality social services.

## **Methodology**

The aim of the research was to identify and characterize the features of providing social services in a rural community, determine the factors and characteristics of the environment that determine the content, forms, and methods of providing social services in a rural community. To achieve this goal, the methods of theoretical analysis of domestic and foreign scientific sources in sociology, medicine, psychology, pedagogy, and social work were used to define the basic concepts of the study; the method of generalization of theoretical

approaches to the problem of providing social services in different conditions of the social environment; the comparative method to identify the features of providing social services in a rural community, and the method of systematization to group and characterize the relevant forms and methods of social work in providing social services in a rural community. In total, 17 studies were analyzed, elucidating various aspects of social service provision in rural communities; 5 sources were normative legal documents of Ukraine. Given the specificity of the chosen research problem, it was important for us to rely on the current legislation of Ukraine.

In this article, we also scrutinized the Law of Ukraine “On Social Services” dated 17.01.2019 No 2671-VIII (Verhovna rada Ukraine, 2019), which serves as the basis for the development of social service provision in Ukraine. Specifically, it describes the system of social service provision (legal framework, principles, methods and forms of social service provision, the set of subjects interacting at all stages of organizing social service provision).

Our analysis of the scientific literature on the research problem allowed us to identify several main methodological levels of its study (philosophical, scientific-theoretical, and applied). In the study, analyzing scientific sources, we presented the following main scientific approaches to the problem of providing social services in rural community conditions: activity-based, axiological, personality-oriented, and technological.

The study of the subject matter was based on the methodological foundation of ascertaining the correspondence of the content of the proposed social services – direct verbal and non-verbal communication with the population of rural communities. Therefore, we did not conduct formal processing of empirical results but presented an intuitive-logical analysis of the problem. We applied the procedure of theoretical triangulation (using different perspectives on interpreting the same data) to verify the reliability of interpretations. The problems of providing social services in rural communities are considered through the prism of several philosophical methods: the unity of the general and specific; the unity of qualitative and quantitative analysis; the method of formalization; the method of analogy; the system-structural method.

## **Research Results**

The central concept of our research is the "community" as a group-based social entity whose members share common geographic and sociocultural characteristics (place of residence, interests, beliefs, values, nationality, etc.) and interact with each other to meet specific needs or solve problems (Bezpalko, 2006). In scientific studies, residential (geographic), identification (professional, youth, women's, religious, etc.) communities, and interest-based communities are distinguished. In a residential community, people interact with each other partly

by chance. The main common feature of these communities is that they are formed based on the place of residence. Territorial and local communities emerge as variations of residential communities. The terms "territorial community" and "local community" can be used interchangeably when a territorial community consists of a single settlement. However, if a settlement (e.g., a village) is considered as part of the territorial community of a city or town, then such a separate settlement with its residents is not a territorial but a local community. Thus, a territorial community can be seen as a collection of local communities.

O. Bezpalko interprets the concept of a "territorial community" as a specific socializing space with unique sociocultural conditions, corresponding agents of socialization, upon which the social formation and development of recipients of social services depend (Bezpalko, 2006). The author emphasizes that a rural community is a specific type of territorial community, as its activities are more influenced by social and everyday characteristics and ethnic properties.

Considering that one of the key characteristics of a community is its territory, depending on the type of settlement, rural, urban communities, and communities of a microdistrict in a large city are defined as meso-levels of the social environment. The main parameters of such communities are identified: natural and economic features of the territory; sociocultural traditions of the population; groups of people based on gender and age characteristics; social infrastructure institutions (educational institutions, social services, socio-cultural institutions, medical facilities, etc.); local self-government bodies and local executive authorities; non-governmental organizations, and so on. These parameters indicate the peculiarities and differences between various territorial communities, thereby influencing the specifics of social work with the population.

In addition to the concept of "community," scientific sources also define the concept of "rural society." In particular, the most widespread definition is that of society as a social reality, a society considered in the context of general forms of human interaction (Zvereva, 2012). We will consider society as a stable social community characterized by unity of living conditions in essential relationships and, consequently, a common culture; as a human community of a certain type (kinship and family, socio-economic, national-ethnic, territorial-settlement communities; the social environment of a person, a set of historically formed forms of human activity. To accomplish the tasks of our research, it was important to detail the approaches to interpreting the concept of "rural society".

O. Lapa defines that openness of communication due to minimized differences in social status positions of residents and the scarcity of social contacts is characteristic of rural society (Lapa, 2006). Moreover, the smaller the rural settlement, the more comprehensive the communication between its residents. It is worth considering that when building a model of social work in rural areas, characteristics such as distance from large cities, population size, demographic and ethnic composition, the presence of religious communities, and the presence



or absence of social institutions - schools, clubs, libraries, clinics, etc., should be taken into account.

Limited opportunities for social and professional growth, specific values, habits, emotional reactions, and socio-psychological attitudes of individuals in rural areas are factors that determine the specificity of social work in rural society (Bezpalko, 2006).

Defining rural areas as a complex system that is not exclusively identified with agriculture as a production sector or village as a type of settlement indicates the impracticality of restricting scientific analysis of their essence solely with an industry-specific approach. Therefore, guided by a systemic approach in our research, we find it appropriate to expand the interpretation of the concept of rural society from the perspective of social work.

We will rely on O. Lapa definition, which considers rural society as a unique environment for personality socialization characterized by specific conditions of work and living, limited opportunities for social-labor mobility, the combination of work and household, labor-intensive employment in domestic and subsistence farming, limited cultural leisure in free time, low levels of socio-professional and cultural differentiation, and the necessity of social interaction and support (Lapa, 2006).

Rural society has its sociocultural and socio-economic characteristics that determine the peculiarities of the professional activity of a social worker in rural community conditions. Our goal was to identify the problems of rural society that can affect the process, types, and forms of providing social services.

These problems include: a relatively high level of social control of society over individuals; limited opportunities for the social integration of an individual into the social environment; limitations of social-status and social-role positions in the process of socialization; a high likelihood of social exclusion; specific division of labor; limited social contacts; a small number of social institutions influencing the socialization process, and so on.

The specificity of rural lifestyle determines the peculiarities of work and living of residents, associated with natural cycles, more complex working conditions compared to urban conditions, limited opportunities for social-labor mobility, the combination of work and household, and labor-intensive employment in domestic and subsistence farming. In addition, the range of activities in free time is quite limited, and the lifestyle of rural society has preserved elements of traditional communal rural life until recently (a relatively stable population, low levels of socio-professional and cultural differentiation, close family, godparent, and neighborly ties, etc.). Social control of the community over people's behavior, traditions, customs, and local authorities are of great importance for rural society. At the same time, it should be noted that the pace of life in the village is generally less stressful compared to the city, the

population experiences lower psychological loads, and uses simpler forms of communication (Vakulenko et al., 2005).

In the development of personality within rural society, a crucial aspect is that even in the harshest living conditions, a peasant did not lose the freedom to act in their own affairs; they were not instructed on how to plow or what to sow. This freedom, with some limitations, was maintained through village self-government, where important life issues were discussed in community gatherings.

Another characteristic of rural society is the perpetual circle of communication. The familiar environment of an individual remains largely unchanged, and familial, neighborly, and community connections are marked by stability. Hence, everyday politeness and friendliness persist as norms in rural society (Lapa, 2006).

The rural community knows the way of life of each fellow villager, understanding their strengths and weaknesses. In such conditions, social control regarding family and individual behavior is maintained, significantly influencing a person's conduct. The influence of public opinion, shaped by the surrounding community, was noteworthy in the formation of one's personality.

A prominent feature of rural society is the central role of the family in an individual's life. The family served as a productive unit, and collective labor was a defining factor in family relationships. Daily household activities served as a source of peasant existence, safeguarding youth and adults from aimlessness, thoughtlessness, laziness, and protecting them from debauchery and inactivity.

Life experience and family traditions ensured the continuity of generations, with one life stage not opposed to another. According to folk traditions, childhood and youth, maturity, and old age were equally revered. Childhood, adolescence, youth, maturity, old age, and infirmity naturally succeeded each other. The peasant also naturally embraced their social roles at different stages of life.

The moral potential of rural society always had a noticeable impact on the upbringing of the younger generation. A child was under the care and supervision of the family and the extended family. Modern education of rural children also follows the traditions of the peasant upbringing system: early involvement in feasible work, participation in community activities, toughening, and close contact with nature.

A peasant never imagined their life without their extended family, ancestors, parents, and remembered the traditions and the ancestral legacy. For a happy life (i.e., successful personal socialization), it was necessary to love work and agriculture, respect the community to which life values were tied, ensuring survival and well-being; non-coercive "construction" of the human environment; responsibility of each person to future generations; respect for distant and close community members.

Particularly relevant for identifying issues in rural social work is the attention to rural youth, uncovering their problems and requests. To this end, on the

initiative of the Ministry of Youth and Sports of Ukraine, an annual study is conducted to assess the situation of youth, including socio-economic status, values, and preferences. Analyzing the results with a shifted focus on the impact of Russia's full-scale invasion, it has been found that the concern for health (either personal or of close ones) among young people has significantly increased — 50% compared to 35% in 2021; as well as concern for mental health — 22% compared to 11% in 2021. Concerns about physical safety were reported by 27% of respondents, lack of self-realization opportunities by 19%, and inability to find employment by 19%. Youth income has significantly decreased, with 40% stating that they do not have enough for food and/or only enough to cover basic needs (compared to 23% in 2021) (Volosevich et al., 2023). Therefore, the focus of social work tasks in rural areas should be on supporting youth, young families, and youth initiatives. One important resource in this context is the use of the volunteer movement to implement the ideas of local authorities and community initiatives (Liakh & Spirina, 2021). A crucial factor in the success of youth in social interaction and life in general is the development of the social-emotional skills of children and adolescents. Social qualities, emotional intelligence, soft skills, and all components related to the socio-emotional sphere are extremely important for social, personal, and professional development (Skrypnyk et al., 2021). Therefore, it is important to focus on enhancing the competence of social educators to improve their ability to meaningfully develop the socio-emotional skills of rural youth.

The importance of developing a social and inclusive environment in the territorial community should not be overlooked. Social inclusion and the participation of community residents in making responsible decisions can contribute to overcoming social injustice, exclusion from certain social relations, discrimination, and promote active adaptation and positive socialization (Liakh et al., 2023).

The analysis of scientific approaches to the characteristics of rural society has allowed us to identify issues that may determine the specificity of providing social services in a rural community:

1. Lower socio-economic development, a certain lag in the level of well-being, lifestyle, which consequently affects the social structure and way of life of the entire population.
2. Limited job options, relatively weak job differentiation, higher unemployment rates, and weak labor mobility.
3. Lag in mechanization and energy supply of labor, fewer job choices, and weak opportunities for selection.
4. Subordination of rural work to the rhythms and cycles of nature, more challenging working conditions, the merging of work and daily life, and the necessity and labor intensity of work in household and subsidiary farming.

5. Limited representation of institutions for leisure organization, lack of free time, and establishments and agencies providing socio-cultural and entertainment services.
6. Specific interpersonal relationships built on the principles of social control, customs, and traditions.
7. Prevalence of socially and nationally homogeneous families, lack of anonymity in communication, and weak formation of many social roles.

In the next stage of theoretical analysis, it was deemed appropriate to characterize the theoretical principles of providing social services in a rural community. According to Ukrainian legislation, social services are defined as actions aimed at preventing complex life circumstances, overcoming such circumstances, or minimizing their negative consequences for individuals/families experiencing them (Verhovna rada Ukraine, 2019).

Providing social services is based on the principles of specificity and individual approach; accessibility and openness; humanity; maximum efficiency in the use of budgetary and non-budgetary funds by service providers; legality; social justice; ensuring confidentiality; adherence to quality standards; responsibility for ethical and legal norms compliance.

Such services may be aimed at: social prevention - preventing the occurrence of complex life circumstances and/or the entry of individuals/families into such circumstances; social support - assisting individuals/families in overcoming complex life circumstances; social service - minimizing the negative consequences of complex life circumstances for individuals/families, supporting their life activities, social status, and inclusion in the community.

The provision of social services involves the implementation of the following basic types of social work (Verhovna rada Ukraine, 2019):

- Identifying the population's needs in the administrative-territorial unit/territorial community for social services, including involving non-governmental service providers and publishing the relevant results.
- Informing the population about the list of social services, their content, and the procedure for provision in a form accessible to individuals with any type of health impairment.
- Conducting measures to identify vulnerable population groups and individuals/families experiencing complex life circumstances.
- Providing basic social services to individuals/families based on their needs, taking measures to provide other social services to such individuals/families by creating a network of social service providers.
- Approving, securing funding, and implementing regional programs to meet the needs of individuals/families in social services, developed based on the identified needs of the population in the administrative-territorial unit/territorial community for social services.

- Determining the specifics of providing social services in the territory of the respective administrative-territorial unit/territorial community in case of the introduction of a state of emergency or war in Ukraine or specific areas thereof.

As we can see, the main provider of social services is identified as the territorial, and consequently, rural community. In order to optimize and take a comprehensive approach to providing social services, complex institutions/facilities for social services may be established, the structural or separate (territorial) units of which provide various social services to different population groups. T. Semygina emphasizes that the biggest barriers to providing quality social services arise at the level of the territorial community because the experience of recent years indicates violations of citizens' constitutional rights to care in some communities (Semygina, 2019). For example, the network of territorial centers for social services is shrinking, social workers are included in the executive committees of amalgamated territorial communities, citizens are removed from service, and left without social services. Or communities refuse to fund family-type children's homes, where children left without parental care were once placed. This raises the question of the reality of the declared list of free services guaranteed by the state for categories of persons entitled to receive them, and the "basic service basket" that should be in each local territorial community. In our opinion, such a list should be separated, taking into account the specificity of the rural community.

### **Conclusions and Recommendations**

Based on the definition of socialization factors (Andrushchenko et al., 2003), we have identified factors that determine the process of providing social services in rural communities.

*Seasonal Factor:* This factor is crucial for optimizing practical social work in rural society. Considering this factor allows structuring the process of providing social services, determining priority directions for social support, taking into account the seasonal labor activities of the rural population.

*Social-Historical Factor:* This factor involves considering the historical and cultural heritage of a specific region, the influence of historical traditions, customs, and rituals. It enables the involvement of leading social institutions (schools, clubs, youth centers, religious parishes) in the process of providing social services.

*Social-Pedagogical Factor:* This factor requires taking into account the pedagogical possibilities of a specific rural environment, its pedagogical potential preserved in folk culture, crafts, and customs.

*Sociocultural Factor:* This factor creates an understanding of the cultural potential of rural society, the totality of cultural objects, and the sociocultural activity of the population.

*Educational Factor:* It should be implemented considering the educational opportunities of families, educational institutions, public and state institutions in a specific community, taking into account their potential in providing social services.

*Social-Household Factor:* This factor allows analyzing the living conditions of the population and their impact on the personal development of individuals, the state of mental and physical health, behavioral characteristics, and determines the specifics of providing patronage services.

*Social-Demographic Factor:* This factor allows predicting social processes in rural areas, finding means to equalize starting opportunities for children and youth, providing support to families and the elderly.

*Social-Ethnic Factor:* This factor considers the ethnic specificity of the rural environment, harmonizing relationships through multicultural education based on ethnic tolerance.

*Social-Religious Factor:* In providing social services, it involves considering the work of religious parishes in the rural community and using pastoral support and patronage forms in social work.

Thus, we define the rural community as a space of socialization with an orientation towards specific characteristics of folk culture and customs; conditions of seasonal labor activity and daily household management; interpersonal relationships built on the principles of social control and kinship; priority of family, religious, and ethnocultural values. We have identified a list of factors (seasonal, social-historical, social-pedagogical, sociocultural, educational, social-household, social-demographic, social-ethnic, social-religious) that determine the process of providing social services in the rural community.

We have established that the peculiarities of providing social services in rural conditions are determined by the interconnected social environments, namely: the environment of the rural family (shapes moral principles, values, and youth behavior); the environment of the rural community (influences with specific sociocultural, ethnic, and religious features) and institutions that act as partners in social work.

Promising directions for future research include determining the satisfaction level with the provision of social services in the rural community and identifying the conditions for the effectiveness of providing social services in the rural community.

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# “SCHOOLS FOR LADIES AND GENTLEMEN” AS A SPECIFIC FORM OF NON-FORMAL EDUCATIONAL INSTITUTIONS IN FAR EAST COUNTRIES (China, Japan, South Korea and Singapore)

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**Abstract.** *“Schools for Ladies and Gentlemen” is a term commonly used to determine a non-formal educational institution in some of Far East countries where the students are taught mainly abroad ethics and aesthetics. Such educational institutions can be considered a vestige of the foreign countries` presence on the territory of the countries under consideration in the 19th-20th century, since it was the social activity of some European countries and US that largely determined the shape and value orientation of the education system in China, Japan, South Korea and Singapore in particular. The second half of the 20th century in the countries considered is characterized by a revision of foreign educational trends, which led to the departure of the abroad educational experience from the mass formal education. However, the social prestige of “foreign education” and the introduction of a child to “foreign ethical and aesthetic canons” as an indicator of financial well-being and social elitism has been preserved and has found its expression in the sphere of non-formal education in the form of clubs, circles, the services of private tutors, etc. The article examines the exact forms in which this trend is present in the educational sphere of one or another country in the Far East.*

**Keywords:** *China; Japan; non-formal education; Singapore; South Korea.*

## Introduction

The colonial era in East Asia, marked by the influence of Western powers, has left a lasting imprint on the region's education systems. Despite the complexities and challenges associated with colonial rule, the policies implemented by foreign countries have had several positive impacts, shaping the educational landscapes of China, Japan, South Korea, and Singapore. These impacts continue to resonate in contemporary educational practices and achievements. The legacy of colonial educational systems continues to permeate

various aspects of modern educational landscape of the countries under consideration, including non-formal education. While much attention is often given to formal educational institutions, such as schools and universities, the influence of colonial-era policies and practices on non-formal education is equally significant and today manifests itself in creation of new forms of educational institutions that have European-American trends in their philosophy and/or structure (mainly of the late 19th - first half of the 20th century), but are designed to serve completely different social goals: increasing social elitism and being an indicator of well-being of the family, that can afford such an education service for the child; additional educational opportunities for the student; eliminating gaps in formal education etc. The aim of this article is to introduce the concept of "Schools for ladies and gentlemen" as a distinctive occurrence of refined informal education within the Far Eastern nations, stemming from colonial legacies. Furthermore, it seeks to explore the practical manifestations of this notion in the contemporary educational landscapes of countries like the People's Republic of China, South Korea, Japan, and Singapore. In crafting this article, the authors used the research methods commonly found in compelling works within the realms of comparative pedagogy. One notable aspect of the scientific research method employed in this article involves utilizing a territorial and historical approach to juxtapose similar realities within the pedagogical practices of a single country. This method aims to discern the specificities of their genesis and historical development within the country.

### **Literature review**

The entire amount of literature used in writing this article can be divided into 2 large groups. The first group includes publications that highlight the general trends of the influence of the colonial policy of foreign countries on the educational sector of colonial countries in Asia region. The works devoted to these aspects, are articles of Chuong Dang Van (2018), Engriyani E. and Madhakomala R. (2023), Harper T. (2009), Smith M. (2001). The second group includes publications that highlight the history and present of non-formal education in the countries selected for analysis (Bag Myeong Hui, Baeg Il U (2016), Kim Y. for South Korea (2016); Bagnall R. For Japan (2017); Shi L. For China (2019); Sun W. and Xue L for Singapore (2021). Data and information from the official websites of the Singapore Ministry of Education (2024), the Shanghai Association of Non-Governmental Education (2021), the Japanese city Matsue (2021), and others were also used to determine the current state of non-formal education and the characterization of "schools for ladies and gentlemen" as special educational institution in the countries determined for consideration.

## **Methodology**

Researching "schools for Ladies and Gentlemen" as a specific form of non-formal educational institutions in Far East countries like China, Japan, South Korea, and Singapore, the authors employed a combination of several research methods to gain a comprehensive understanding of the topic chosen. In particular: literature review (to understand the current state of research, identify gaps, and refine your research questions); case studies (to see the practical side of such educational institutions' functioning and to determine their role in the educational system of the country under consideration); observational research (as all the authors are orientalist by their educational and professional background, the article contains information which was gathered by the authors during their work and study in the countries under consideration); content analysis (to provide insights into their educational objectives and areas of focus of such educational institutions); comparative analysis (to identify similarities and differences in forms and functions of such educational institutions in the countries under consideration); policy analysis (examine of government policies, regulations, and initiatives related to non-formal education in each country was used to predict the future of this specific form of educational services in the countries chosen)

## **Research results**

Throughout history, the colonial era has left a profound mark on the societies and institutions of countries that were once under foreign rule. While much discourse rightly focuses on the negative consequences of colonialism, it is also essential to acknowledge the positive impacts, particularly in the realm of education. Despite the often exploitative and oppressive nature of colonial rule, the education systems established by colonial powers have had lasting positive effects on the development and progress of former colonies. Before colonisation, education in many societies was informal, mainly introduced through oral traditions and apprenticeships. The establishment of regular education institutions (schools, professional education schools, institutes, universities) by colonial administrations provided access to structured learning opportunities for a wider segment of the population (Smith, 2001). It should also be mentioned that the very idea of regulated education, women's education, educational level, compulsory education and some others, as well as seeing education as the natural right of a person in society, was also mainly introduced by the colonists (Sun & Xue, 2021). This laid the foundation for the modern education systems that exist in many countries of the world (which are former colonies).

Colonial education policies often emphasised the adoption of Western languages and academic curricula. While this was a means of cultural imposition and navigation of local educational and cultural achievements, it also facilitated

communication and exchange of the countries under the colonial regime with the wider world and between each other. Thanks to such abroad countries' active presence, the educational and business-principal background of under-colonial countries was somehow levelled-up which gave these countries great benefits in post-colonial period (through economic unions and equity of language-education background) (Harper, 2009). Proficiency in languages such as English, French, or Spanish enabled former colonies to engage in international trade, diplomacy, and academic discourse, opening up avenues for intellectual and economic advancement as an independent state entity and quickly finding its place in the global economy.

Moreover, colonial education systems played a significant role in the dissemination of scientific knowledge and technological advancements. Colonial powers introduced modern scientific principles, methods, and technologies (the ones that were up-to-date for the period of active presence of the colonizers) to their colonies, which contributed to the development of local industries, healthcare systems, and agricultural practices (as they got the concentrated and already tested and approved methods of managing and operating, skipping somehow the evolutionary process of R&Ds and starting their independent activity in this field from the higher technological and scientific position in the post-colonial period) (Chuong, 2018). And while colonial education systems often promoted social mobility and meritocracy to some extent (it sanded for other "key features" of a person to access to education: f.e. being a Christian to be selected for a school attached to a foreign mission) it was often stratified along racial, ethnic, or class lines and talented individuals from all backgrounds could still rise through the ranks based on academic achievement (at least, at institutions, attached to the colonizers). This provided opportunities for upward social mobility and contributed to the emergence of a new educated elite in many post-colonial societies.

**China:** During the late Qing Dynasty, China experienced significant encroachment by Western powers, particularly in the aftermath of the Opium Wars. The imposition of unequal treaties and the forced opening of treaty ports exposed China to Western ideas and educational models. One positive outcome of this colonial influence was the introduction of modern educational institutions and pedagogies. Missionary schools and Western-style universities were established, providing access to a broader range of subjects, including science, technology, and humanities. These institutions played a crucial role in fostering intellectual curiosity and modernisation efforts in China (Spires, 2017). Today, the legacy of these educational reforms can be seen in China's emphasis on STEM (Science, Technology, Engineering, and Mathematics) education and its investment in research and innovation (Noah's Boat, 2022). The remnants of colonial influence on non-formal education in modern China are evident in various aspects of educational practices and institutions. One notable example is

the persistence of informal study groups and community-based learning initiatives, which can trace their roots back to the missionary schools and grassroots educational movements of the colonial era. These non-formal educational settings often emphasize practical skills, vocational training, and values of Western educational philosophies and sociology. “Schools for Ladies and Gentlemen” is a striking example of a special educational service in modern China (especially in regions which are traditionally associated with the foreigners’ colonial activity and presence: Shanghai, Guangzhou, Macao, Hong-Kong, Shenzhen, Xiamen etc.). At such institutions of additional education children learn a foreign language (mainly - English), how to eat with a knife and fork, horse-riding, tennis, European manners, ballroom dancing (the list of disciplines differs from school to school and depends on teachers’ abilities and parents’ ideas), understanding European painting and art, together with teachers (or private tutors) students attend concerts of classical European music, exhibitions, etc. The activities of such schools (or they also can be called “social clubs” as this term better reflects their idea) are aimed at training students with European manner of behavior and formation of their aesthetic picture of the world based on European classical art (Shi, 2019). Typically, students on the territory of such a club communicate exclusively in a foreign language, wear a uniform (which in appearance is similar to the uniform of private European schools). The target audience of the school is usually children of 3-10/12 years old because after the child enters the middle grades of secondary school, the school load in formal education makes attending of additional educational structures almost impossible. Attending of such a “school of ladies and gentlemen” has no practical access to the formal education in China (since it belongs to the sphere of non-formal education), is a completely paid service (on average, about 2 thousand US dollars for a child per month with visiting the school 4 times a week (including Saturday) for 3 hours each time) (Shanghai Association of non-government education, 2021) and, due to such a high cost, is more appealing to creating an image of elitism for parents and is an indicator of the family’s material well-being.

**Japan:** Being a country with tangible colonial ambitions, Japan, on the one hand, was subject to Westernisation trends (particularly in education), on the other hand, it itself sought to impose its own ideas and views on the regions that were dependent on it (mainly Korea and Taiwan). Not being a colony in the classical sense of the word, at the end of the 19th century Japan, in order to achieve its economic goals, could not help but reform its own views on education (levelling and non-perception of the British-American education system as a concept would have lead to the inability to obtain and operate industrial technologies, in which Japan at that time of its development was extremely interested in) (Bagnall, 2017). This feature of the Japanese educational system gives us the right to talk about the colonial tendencies of foreign countries (mainly the USA and Britain) in the field of education in Japan in the mid and late 19th century. As for the form of non-

formal education under study, it can be said that Japan, on the one hand, has included such educational institutions in the system of non-formal education to profile the skills of children (art, sport and language schools), but on the other hand, there are also institutions like clubs, which also retain the functions and educational purposes inherent in the "Schools for Ladies and Gentlemen" (known as "kouminkan"). Kouminkan ("community centres" or "public halls") are multipurpose facilities established by local governments to serve the needs of residents within a community. Kouminkan also offers a wide range of educational programs and classes to residents of all ages, including children. Japanese kouminkan are primarily sponsored and funded by local governments, such as municipalities and prefectures. Courses and programs for each kouminkan often include master classes or longer courses in painting, gastronomic preferences, and new US literature (mostly). Also, courses in golf, tennis, classical ballroom dancing, etc. can be organised (Official site of Matsue-city kouminkan, 2021). Visiting Kouminkan is a traditional form of leisure for the Japanese, which they install in their children to promote community well-being, fostering social connections, and enhancing the quality of life for residents in Japan. As for more traditional forms of non-formal education (courses, clubs, etc.), they are also widely represented in Japan. Recently, the work of international schools has intensified, providing their educational services in the Japanese market (training at an international school is a full-fledged, albeit very expensive, alternative to formal education in the country). Mostly, in Japan there are international schools with a central office outside Japan. Such schools are located mostly in Tokyo (Sunnyside International School, Tokyo International School, Nishimachi International School) and Kobe (Canadian Academy). These schools copy the system and educational principles of schools in the country of the head office, are private, and prestigious from a social point of view (Official site of Sunnyside International School, 2024). "International School of the Sacred Heart" (ISSH) (a school for girls) and St. Mary's International School (a school for boys) can be seen as a unique example of colonial traditions in education preservation. Both schools are located in Tokyo, follow a Catholic-based curriculum and provide a rigorous academic program along with extracurricular activities and community service opportunities.

**South Korea:** South Korea's education system has been profoundly influenced by its colonial history, particularly under Japanese rule from 1910 to 1945. Despite the oppressive nature of Japanese colonialism, the period also witnessed the modernisation and expansion of education infrastructure in Korea. Japanese colonial authorities invested in the establishment of schools, the standardisation of curricula, and the promotion of literacy among the Korean population. These initiatives laid the groundwork for South Korea's post-war economic miracle and its emergence as a global leader in education. Informal (mainly, private) education began to take shape in the country back in the days of

the first missionaries who arrived in Korea from Western countries. Until 1910, there was a significant number of private educational institutions on the territory of the Korean Peninsula, which were established by the missionaries. After 1945, the private sector became active because parents were willing to pay for additional education opportunities, as they saw education as the only mechanism for their child to achieve a high social level (Bag & Baeg, 2016). Since the middle of the last century, the demand for private education has increased significantly as lifestyles have become westernized and the country's population has modernized due to rapid social changes and economical development. "Hagwon" is a term used in South Korea to refer to private, for-profit academies or cram schools that offer supplementary education outside of regular school. Hagwons typically offer a wide range of educational services, including tutoring, test preparation (such as for college entrance exams like the CSAT), language classes (especially English), and enrichment programs in subjects like mathematics, science, and the arts. There are hagwons catering to students of all ages, from preschoolers to adults. Some hagwons specialize in specific subjects or target particular age groups, while others offer a broader range of educational services. (Good Job Korean, 2023). Studying in hagwon is considered elitist and an indicator of the family's financial capacity and its high social level (in 2022, families with an average monthly income of 8 million South Korean won (about 5,500 Euros) spent an average of 648,000 (450 Euros) per month on their child's private education (Statista, 2023). The beginning of hagwon education in its modern form dates back to the beginning of the 20th century, when Korea began to adopt Western culture. The first hagwons were youth schools, educational institutions, and academies. In Seoul, the first institution of such kind was established by Hwang-Sang Young Men's Christian Association in 1903 (Kim, 2016). In addition to studying the Bible, students could attend math and English classes. They also were taught modern European music and art. As more than 100 years ago, today's hagwons emphasize the study of mathematics and English. Programs of ethical-aesthetic, musical and artistic directions are represented by playing the piano, violin, flute, etc. (Good Job Korean, 2023). Taking into account the development of modern art and trends coming to South Korea from Europe and the US, hagwons began to introduce classes in modern illustration, 3D design and visualization, clay crafting, origami, ribbon art, etiquette lessons, and more (Kim, 2016). Hagwon physical education offers include various sports such as taekwondo, aikido, kendo, swimming, golf, table tennis, dance, figure skating, and soccer. This can be explained by the fact that Korean society actively observes sports life and news from abroad, and also tries to develop various types of sports, especially Olympic ones, in a European manner.

**Singapore:** As a former British colony (in the 19th century the country served as a strategic trading post for the British East India Company), Singapore's education system bears the imprint of colonial policies aimed at producing a

skilled workforce and fostering social cohesion. The emphasis on bilingualism and multiculturalism in Singapore's education system reflects the colonial legacy of diversity and inclusivity. While formal education institutions play a significant role in shaping the educational experiences of Singaporean students, non-formal education settings also reflect the remnants of colonial influence, particularly in units that operate in English and provide students with European aesthetic views, such as teaching European art and dances. (Yiteng Education, 2020). Community Centers (for children age 4-15) and Specialized Enrichment Centers (for teens and youth under 21) form a vivid network of non-formal education institutions located throughout the island, which offer a variety of enrichment programs and activities, including academic enrichment (such as mathematics, science, and language tuition), arts and music education, sports training, and leadership development. (Engriyani & Madhakomala, 2023). While non-formal education programs and activities may not lead to formal academic qualifications, they are still valued and financially sponsored by the Singaporean government as part of lifelong learning initiatives. Additionally, participation in non-formal education activities is often recognized and encouraged as a means of holistic development and lifelong learning for schoolchildren. In the framework of our research we are very much interested in experience of SOTA - a specialised independent school in Singapore that offers a unique curriculum focused on the arts, including visual arts, music, dance, theatre, and film. Established in 2008, SOTA provides a platform for talented students to pursue their passion for the arts while receiving a rigorous academic education. SOTA is a publicly funded institution, meaning that it receives government funding to support its operations. However, like other specialised schools in Singapore, SOTA charges fees for its educational services. The exact fees vary depending on factors such as citizenship status and household income of the student's family. SOTA is a specialised institution focused on the arts and is recognised as a mainstream secondary school in Singapore that provides also core academic subjects required for the Singapore-Cambridge GCE Ordinary Level (O-Level) examinations. While SOTA primarily emphasises the development of students' artistic talents, it also exposes them to European aesthetic views through courses in Western art history, classical music, film, painting, visual arts and ballet (Official site of Ministry of Education of Singapore, 2024). It should be noted that because of more dense and wide adoption of foreign (British) educational practices, in Singapore elements of "schools for ladies and gentlemen" exist as an organic part of formal educational programs and additional educational services, which, however, are regulated and sponsored by the state.



## Conclusions

In conclusion, while the colonial era is rightly remembered for its injustices and exploitation, it is important to recognise the positive impacts that colonial education policies have had on former colonies. From the establishment of formal education systems to the dissemination of scientific knowledge and the promotion of social mobility, colonial education has played a crucial role in shaping the intellectual, cultural, and economic landscapes of post-colonial societies.

The legacy of colonial education systems somehow continues to shape educational institutions and practices in former colonies today. Many universities, schools, and administrative structures established during the colonial era remain operational, albeit often adapted to suit local contexts. The influence of Western educational philosophies and pedagogies can still be seen in curriculum design, teaching methods, and administrative practices across a wide range of disciplines. In the countries which are under consideration in this article, we can see quite a unique remnant of it: appeared a new type of educational philosophy and practice (which mainly copies by structure the classic western schools of the XIX cent. ) for introducing better educational opportunities for today's students. the positive impact of colonial policies on the education systems of China, Japan, South Korea, and Singapore is evident in their modern educational achievements and practices. By acknowledging and building upon this colonial legacy, East Asian nations continue to strive towards excellence and innovation in education, contributing to their ongoing success on the world stage.

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# PRIEKŠLAICĪGAS MĀCĪBU PĀRTRAUKŠANAS RISKA FAKTORI IZGLĪTĪBAS IESTĀDĒ

## *Early School Leaving Risks Related to Educational Institution*

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**Abstract.** *Some of the main challenges in contemporary education systems are decrease of students learning motivation, students, who don't engage in academic work and early school leaving.*

*In Latvia the percentage of early school leavers still remains high. Main factors reported as the reason for early school leaving were not only risks related to students personality traits, family or social environment, but also risks related to school environment, diverging comprehension of the problems related to at-risk youth among teachers and school staff and different approaches within each school to prevent early school leaving.*

*The method used in the research was questionnaires (with closed and open questions). 195 teachers from comprehensive schools (all districts) in Latvia were involved.*

*The main goal of the research is to analyze teachers comprehension and assessment on early school leaving risks related to school environment and to analyze teachers views about possibilities to identify at-risk youth at an early stage.*

*Another goal of the research is to create a sustainable action plan, to reduce early school leaving risks related to school environment*

**Keywords:** *early school leavers, school environment, prevention .*

### **Ievads**

#### **Introduction**

Mācības priekšlaicīgi pārtraukušo jauniešu skaits laikposmā no 2010. gada līdz 2022. gadam Eiropas Savienībā ir ievērojami samazinājies. 2022. gadā izglītību priekšlaicīgi pametušo īpatsvars ES bija vidēji 9,6 %, kas ir nedaudz labāk par ES uzstādīto mērķi 2020. gadam – 10 % (Eurostat, 2024), taču joprojām uzskatāms par satraucoši augstu.

Priekšlaicīgai mācību pārtraukšanai (turpmāk tekstā – PMP) ir nopietnas sekas gan indivīda, gan sabiedrības, gan valsts līmenī. Vispamanāmākās sekas izglītojamiem, kas priekšlaicīgi pārtraukuši mācības un palikuši ar zemu izglītības līmeni, ir grūtības atrast darbu, jo uz mazāku skaitu pieejamo darba vietu viņiem jākonkurē ar saviem izglītotajiem un kvalifikāciju ieguvušajiem vienaudžiem (Kraģe & Ivanova, 2018). Sabiedrībā kopumā priekšlaicīga mācību pārtraukšana padziļina nabadzību un sociālo izolētību un rada ievērojamas sociālās un ekonomiskās izmaksas. “Priekšlaicīgas mācību pārtraukšanas prevencijas

konceptijā” norādīts, ka PMP izmaksas mūža garumā sasniedz no viena līdz diviem miljoniem eiro uz katru skolu nepabeigušo un, ka valstīs, kurās ir augsts PMP izglītojamo īpatsvars, ir ievērojami sliktāki nodarbinātības rādītāji un liels sociālās kohēzijas slogs (IKVD, 2023).

Atgriezt priekšlaicīgi mācības pārtraukušu jaunieši izglītības sistēmā ir daudz sarežģītāk, nekā savlaicīgi preventīvi novērst mācību pārtraukšanu. Lai to realizētu, svarīgi agrīni pamanīt pazīmes, kas varētu liecināt par PMP, kā arī apzināt un atzīt tos riskus, kas pastāv pašā izglītības iestādē.

Latvijā 2022. gadā pēc Eurostat datiem 6.7 % jauniešu vecumā no 18 līdz 24 gadiem ir priekšlaicīgi pārtraukuši mācības. Analizējot Eurostat 2022.gada datus, vērojamas ievērojamas atšķirības zēnu un meiteņu vidū. 2022. gadā priekšlaicīgi mācības pārtraukušas 4.0 % meitenes un 9.3 % zēnu (Eurostat, 2024). Izglītības iestādēm būtu svarīgi apzināties šo atšķirību un iestādes ietvaros dažādot mācību procesu, atbilstoši izglītojamo vajadzībām.

Pētījuma mērķis- analizēt vispārizglītojošo skolu pedagogu pieredzi par PMP riskiem tieši izglītības iestādē un izstrādāt ieteikumus konkrēto PMP riska faktoru novēršanai.

## **Literatūras analīze** *Literature Review*

Literatūrā tiek izmantoti dažādi termini attiecībā uz priekšlaicīgu mācību pārtraukšanu, piemēram, “atskaitīšana”, “izstumšana”, “izkrišana”, “aizmukšana”, “atteikšanās”, “agrīna aiziešana” un “nepabeigšana”.

Priekšlaicīga mācību pārtraukšana ir vispārēji raksturota kā parādība, kad izglītojamie pārtrauc formālās izglītības iegūšanu pirms vidējās izglītības otrā posma pabeigšanas (Eiropas Speciālās un iekļaujošās izglītības aģentūra, 2017). Eurostat definīcijā kā viens no kritērijiem ir jauniešu vecums. Izglītības ieguvī priekšlaicīgi pārtraukušie ir tie jaunieši, kuri vecumā no 18 līdz 24 gadiem ieguvuši pamatizglītību vai zemāka līmeņa izglītību, bet neturpina tālākizglītību vai apmācību (Eurostat, 2024).

Mācību pārtraukšanai ir sekas, kas ietekmē gan pašu indivīdu, gan sabiedrību kopumā. Sociālās sekas PMP raksturotas kā augstāks noziedzības līmenis vietējā un plašākā mērogā, zemāks ekonomiskās izaugsmes temps, sliktāka sabiedrības vispārējā veselība, zemāka sociālā vienotība un augstāks bezdarba līmenis. Finansiālās sekas priekšlaicīgai mācību pārtraukšanai ir zemāki nodokļu ieņēmumi pašvaldībā un valstī, kā arī augstākas policijas un krimināltiesu izmaksas (Psacharopoulos, 2007). Visas šīs sekas atstāj būtisku ietekmi uz sabiedrības drošību, labklājību un ekonomisko izaugsmi, tāpēc PMP prevencijai svarīga katra riska faktora apzināšana un novēršana.

Kā mācību pārtraukšanas iemesli pētījumos tiek minēti ar izglītojamā personību, ģimeni un sociālo vidi saistīti riski, kā arī tādi ar izglītības iestādes vidi

saistītie riski, kā zema mācību motivācija un atbalsta trūkums (tai skaitā izglītības iestādē) mācīšanās grūtību gadījumā (Kraģe & Ivanova, 2018). Svarīgi noteikt PMP izraisošos faktoros arī izglītības iestādē.

Lai arī PMP problēma ir aktuāla jau ilgu laiku, dažādas rīcības politikas valsts līmenī ir apstiprinātas gadiem, joprojām salīdzinoši maz vai nemaz tiek analizēti tie PMP riski, kurus rada vai var radīt pati izglītības iestāde (tās personāls vai vide).

Metodoloģiskās vadlīnijas darbam projektā „Atbalsts priekšlaicīgas mācību pārtraukšanas samazināšanai” (8.3.4.0/16/I/001) PuMPuRS norādīti daži PMP riski, kas nav saistīti ne ar izglītojama individuālajām īpatnībām, ne ģimeni, ne arī ekonomiskajiem apstākļiem. Tie minēti pie izglītības iestādes vides riskiem kopā ar tādiem mācību darba riskiem kā slinkums un nepatika mācīties, zemi vērtējumi, kavējumi. Šie riski būtu izdalāmi atsevišķi kā specifiski PMP riski, kas tieši saistīti ar izglītības iestādes kā organizācijas darbu:

- izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu;
- neatbilstoša vai neprofesionāla izglītības iestādes atbalsta personāla rīcība;
- neatbilstošs izglītības satura pasniegšanas veids (šāds formulējums sniegts projekta “PuMPuRS” materiālos);
- slikts izglītības iestādes mikroklimats;
- augsti vai pārspīlēti izglītības iestādes disciplīnas standarti;
- izglītības iestāžu rīcība, atklājot bērnus ar speciālām vajadzībām;
- nepilnīgs valsts un pašvaldību atbalsts izglītības iestādēm (IKVD, 2020).

Pētījumos konstatēts, ka augstam PMP riskam pakļauti izglītojamie ar uzvedības problēmām (Nairz-Wirth & Gitschthaler, 2019). Pētījumi atklāj, ka bieži izglītojamie ar emocionāliem vai uzvedības traucējumiem nesaņem vajadzīgo atbalstu (Sinclair et al., 2020).

Saskaņā ar LR Valsts kontroles revidentu aplēsēm 2020. gadā Latvijā bija vismaz 10 tūkstoši bērnu ar uzvedības problēmām un vairāk nekā 36 tūkstošiem bērnu pastāvēja uzvedības problēmu rašanās risks (LRVK, 2022), kas nozīmē, ka visi šie bērni ir PMP riska grupā un tāpēc sevišķi svarīgi, lai pedagogi būtu gatavi strādāt ar bērniem, kam ir uzvedības grūtības un pedagogiem būtu attīstītas disciplinēšanas prasmes.

Valsts kontroles revīzijas rezultāti liek domāt arī par izglītības iestādes izvēlētajām metodēm izglītojamo uzvedības problēmu risināšanai un izvērtēt, vai izglītības iestāde patiesi veic darbu izglītojamā uzvedības maiņai, vai vairāk nodarbojas ar vecāku informēšanu par bērna problēmām un izglītojamo brīdināšanu par citu institūciju (policijas, sociālā dienesta, administratīvās komisijas) iesaistīšanu (LRVK, 2022).

Eiropas Savienības Padome kā preventīvus pasākumus priekšlaicīgas mācību pārtraukšanas novēršanai norāda agrīnu riska faktoru, piemēram, mācīšanās traucējumu, attīstības problēmu, valodu prasmes un speciālās izglītības vajadzību, sociālo un emocionālo grūtību identificēšanu. (Eiropas Savienības Oficiālais Vēstnesis, 2022). PMP riska faktoru izglītības iestādes darbā identificēšanai būtiska ir izglītības iestādes personāla kompetence atpazīt šādus riskus un vienota rīcības politika atklāto PMP risku mazināšanā. Eiropas Savienības padome kā preventīvos, intervences un kompensējošos pasākumu norādījusi arī atbalstu pedagogiem zināšanu apgūvē, prasmju un kompetences pilnveidē, nodrošinot, ka viņiem ir pietiekami daudz laika, vieta un atbalsts, lai efektīvi strādātu ar visiem izglītojamajiem, kas ir pakļauti izslēgšanas, nesekmības un izglītības priekšlaicīgas pamešanas riskam (Eiropas Savienības Oficiālais Vēstnesis, 2022). Lai to varētu realizēt, izglītības iestādes vadībai jāiegulda resursi pedagogu kompetences paaugstināšanai savlaicīgi pamanīt gan mācību grūtības, gan uzvedības izpausmes, kas varētu liecināt par PMP riskiem.

## **Metodoloģija** *Methodology*

Pētījumā precizēta pētāmās parādības - priekšlaicīga mācību pārtraukšana-būtība, analizējot iesaistīto ekspertu (pedagogi) teikto un viņu darbību, kā arī skaidrojošā veidā atklāta izvēlētās problēmas būtību.

Pētījums balstās uz vairākiem iepriekš veiktiem pētījumiem, nonākot pie jauniem vispārinājumiem. Tas ir neeksperimentālais pētījums, jo tiek pētīta situācija, kāda tā ir patlaban.

Pētījumam ir kvalitatīvā pētījuma pazīmes, jo autore pieņem, ka pastāv tikai viedokļi par realitāti un atzīst savu subjektivitāti un pārliecību par kādām konkrētām vērtībām (Geske &Grīnfelds, 2020).

Vispārīzglītojošo skolu pedagogu pieredzes PMP risku izglītības iestādē noteikšanai tika izmantota kvantitatīva pētījuma metode - aptauja. Aptaujas anketā tika iekļauti 68 jautājumi, kas sadalīti 8 skalās atbilstoši iepriekš minētajiem riska faktoriem (pedagogu kompetence atpazīt PMP riskus; izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu; neatbilstoša vai neprofesionāla izglītības iestādes atbalsta personāla rīcība; neatbilstošs izglītības satura pasniegšanas veids; slikts izglītības iestādes mikroklimats; augsti vai pārspīlēti izglītības iestādes disciplīnas standarti; izglītības iestāžu rīcība, atklājot bērnus ar speciālām vajadzībām; nepilnīgs valsts un pašvaldību atbalsts izglītības iestādēm) , taču šajā rakstā analizēti tikai 4 skalu rezultāti un tikai tie šo skalu apgalvojumi, kuros visvairāk secinājumu izvirzītajam riska faktoram.

Šajā rakstā autore analizēs riska faktoros:

- Pedagogu kompetence atpazīt PMP riskus;

- Izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu;
- Slikts izglītības iestādes mikroklimats;
- Izglītības iestādes rīcība, atklājot bērnus ar speciālām vajadzībām.

Pedagogu viedokļa par PMP riska faktoriem un identificēšanas iespējām izglītības iestādēs mērīšanai tika izvēlēta Likerta skala

Pētījumā piedalījās 195 pedagogi no dažādām LV vispārizglītojošajām skolām. Pavisam elektroniski tika izsūtītas 800 aptaujas anketas tiem vispārizglītojošo skolu pedagogiem, kas iepriekš pieteikušies un arī piedalījušies raksta autores vadītos 12 akadēmisko stundu profesionālās kompetences pilnveidesursos par priekšlaicīgas mācību pārtraukšanas riska faktoriem un iespējamo atbalstu to novēršanai. Pedagogu aptauja veikta 2022./2023.mācību gada 2.semestrī. Pedagogu izlases aprakstošās statistikas rādītāji apkopoti 1. tabulā.

*1.tabula. Pedagogu izlases raksturojums (autores veidota)*  
 Table 1 Characteristics of the selection of teachers (made by author)

Vidējais vecums 51,7 gadi		n	%
Dzimums	sieviete	182	93,3
	vīrietis	13	6,7
Darba stāžs	0-5 gadi	22	11,3
	5-10 gadi	15	7,7
	10-20 gadi	31	15,9
	vairāk kā 20	127	65,1
Ieņemamais amats	mācību priekšmeta skolotājs	135	69.2
	administrācijas pārstāvis	26	13.3
	klases audzinātājs	81	41.5
	atbalsta speciālists	33	16.9
	cits	11	6

Anketas saturiskā piemērotība, kā arī jautājumu un piedāvāto atbilžu piemērotība tika pārbaudīta pilotanketēšanas laikā 2 skolās (pamatskola ar 300 izglītojamiem, vidusskola ar 500 izglītojamiem). Jautājumu izstrādē tika iesaistīti eksperti (pedagogi, izglītības psihologs). Izveidotās anketas ticamības pārbaudei

tika aprēķināta skalu iekšējā saskaņotība, izmantojot Kronbaha alfas koeficientu (2.tabula).

2.tabula. *Kronbaha alfas koeficienti aptaujas skalām (autores veidota)*  
Table 2 *Cronbach's Alpha coefficient for the survey scales (made by author)*

PMP riska faktora skala	Kronbaha alfa
Izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu	0.844
Pedagogu kompetence atpazīt PMP riskus jauniešiem	0.744
Slikts izglītības iestādes mikroklimats	0.677
Izglītības iestādes rīcība, atklājot bērnus ar speciālām vajadzībām	0.795

Pētījumā analizētajām skalām (pedagogu kompetence atpazīt PMP riskus; izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu; slikts izglītības iestādes mikroklimats; izglītības iestādes rīcība, atklājot bērnus ar speciālām vajadzībām) ticamības rādītāji vērtējami kā labi. Skalā „Slikts izglītības iestādes mikroklimats” ticamības rādītāji ir nedaudz zemāki, bet pietiekami turpmākai analīzei.

### Pētījuma rezultāti

#### *Research results*

Vidējie rādītāji aprēķināti skalā no 1 līdz 4, kur 1 – pilnībā nepiekrītu, 2 – nepiekrītu, 3 – piekrītu, 4 – pilnībā piekrītu

M (Mean) – matemātiski aprēķināta aritmētiskā vidējā vērtība, SD (Standard Deviation) – standartnovirze ir izlases variācijas rādītājs, ko nosaka, izvelkot kvadrātsakni no izlases dispersijas.

Pedagogu aptaujas rezultāti 3.tabulā liecina, ka pedagogi jūtas labi sagatavojušies darbam ar izglītojamiem, kam ir mācību grūtības ( $M=2,933$ ,  $SD=0,760$ ), bet ne tik labi darbam ar izglītojamiem, kam ir uzvedības grūtības ( $M=2,574$ ,  $SD=0,824$ ). Pedagogu pārliecībai par savām prasmēm un kompetencēm ir liela nozīme, jo tas mazina spriedzi un veicina labizjūtu darbā. Savukārt izglītojamo mācību sasniegumi un vēlme mācīties ir lielā mērā atkarīgi no pedagoga darba, lomas un labizjūtas skolā ((Elksne& Rubene, 2018), tāpēc svarīgi, lai pedagogiem būtu iespēja pilnveidot savas zināšanas par dažādām izglītības procesa grūtībām un to novēršanu. Pedagogu atbildes par to, ka profesionālās pilnveides kursi par izglītojamiem ar speciālām vajadzībām (mācīšanās grūtības, uzvedības grūtības, apdāvinātība, veselības traucējumi) ir pieejami pietiekami ( $M=2,595$ ,  $SD=0,828$ ) liecina, ka riska faktors “*izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu*” ir novēršams ar jau esošajiem resursiem.



**3.tabula. PMP riska faktoru izglītības iestādē skalu vidējie rādītāji -I**  
 (autores veidota)

**Table 3 Average of the scales of early school leaving risks in educational institution I**  
 (made by author)

<b><i>Izglītības iestāde nenodrošina izglītojamā vajadzības un spēju potenciālu (n=195)</i></b>	M	SD
Lielākā daļa pedagogu jūsu skolā gatavi strādāt ar izglītojamiem, kuriem ir mācību grūtības	2,933	0,760
Lielākā daļa pedagogu jūsu skolā ir gatavi strādāt ar izglītojamiem, kuriem ir uzvedības traucējumi	2,574	0,824
Labi pārzinu un izmantoju stratēģijas izglītojamo disciplinēšanai mācību stundās	2,954	0,691
Profesionālas pilnveides kursi par izglītojamiem ar speciālām vajadzībām ir pieejami pietiekami	2,595	0,828
<b><i>Pedagogu kompetence atpazīt PMP riskus jauniešiem (n=195)</i></b>	M	SD
Mācīšanās grūtības izglītojamiem visbiežāk konstatē pēc sākumskolas pabeigšanas	2,221	0,918
Izglītojamie, kuriem ir slikta lasītprasme sākumskolā, vēlākajos izglītības ieguves posmos bieži ir nesekmīgi vairākos mācību priekšmetos	3,256	0,750
Jebkuru bērnu iespējams iekļaut vispārīzglītojošajā skolā	1,821	0,852
<b><i>Slikts izglītības iestādes mikroklimats</i></b>	M	SD
Izglītojamo iesaiste mācību procesā ir saistīta ar viņu drošības izjūtu skolā	3,164	0,699
Izglītojamo uzvedības pārkāpumi biežāk vērojami, ja skolas pedagogi neveido cieņpilnas attiecības ar izglītojamiem	2,974	0,899
Ja izglītības iestādē izglītojamiem ir nodrošināts viņu vajadzībām nepieciešamais atbalsts, izglītojamie vairāk iesaistās mācību procesā	3,328	0,662
<b><i>Izglītības iestādes rīcība, atklājot bērnus ar speciālām vajadzībām</i></b>	M	SD
Izglītības iestādē, kurā strādājat, ir izstrādāts rīcības plāns gadījumiem, kad rodas aizdomas, ka izglītojamam ir speciālas vajadzības (dzirdes traucējumi, redzes traucējumi, mācīšanās traucējumi, uzvedības traucējumi)	3,236	0,841
Ja izglītojamam nav noteikta speciāla izglītības apguves programma, papildnodarbības un atbalsta speciālistu konsultācijas izglītojamam nav vajadzīgas	1,610	0,807
Mācīšanās grūtību problēmas risināšana ir vecāku atbildība	2,256	0,847

Izglītojamā vajadzību un spēju potenciāla kontekstā priekšlaicīgas mācību pārtraukšanas novēršanai svarīgi arī veicināt izglītojamo individuālos akadēmiskos sasniegumus kā informācijas, zināšanu, izpratnes, attieksmju, vērtību, prasmju, kompetenču un uzvedības kopumu (Ozols, 2019). Šajā pētījumā individuālo akadēmisko sasniegumu veicināšana netiek analizēta, taču vispusīgākai riska faktora identificēšanai un analīzei nepieciešams veikt turpmākus pētījumus tieši šajā virzienā.

Svarīgs PMP novēršanas faktors ir pedagogu prasmes vadīt nodrošināt disciplīnu mācību stundu laikā. Aptaujā iegūtie dati liecina, ka pedagogi pārzina un izmanto disciplinēšanas stratēģijas mācību procesā ( $M=2,954$ ,  $SD=0,691$ ). Disciplīna mācību stundās ir ļoti svarīga tieši mācību sasniegumu nodrošināšanai. OECD pētījumā konstatēts, ka dalībvalstīs izglītības iestādēs ar zemāku disciplīnu ir arī zemāki sasniegumi lasīšanas testā (OECD, 2018). Savukārt lasītprasme ir jebkura mācību priekšmeta apguves pamatā.

Aptaujā iegūtās pedagogu atbildes par to, ka mācīšanās grūtības izglītojamiem biežāk konstatē pēc sākumskolas pabeigšanas ( $M=2,221$ ,  $SD=0,918$ ), ir satraucošs. Lai izglītojamam veidotos pozitīva mācību pieredze, svarīgi problēmas mācību procesā konstatēt un novērst agrīni, pat pirmsskolas posmā. Ja bērna sagatavotība skolai nav pietiekama, tas var būt sākums uzvedības un mācīšanās grūtībām. Jāsaprot, ka priekšlaicīga mācību pārtraukšana nenotiek vienā dienā. Tas ir ilgstošs, dažādu apstākļu sakritības process, kā rezultātā izglītojamais nolemj priekšlaicīgi pārtraukt mācības. Ir pētījumi, kuros konstatēts, ka izglītojamie, kam sākumskolas posmā bijuši slikti rezultāti lasītprasmē, ievērojami biežāk priekšlaicīgi pārtraukuši mācības vēlākajos izglītības ieguves posmos (Hickman & Heinrich, 2011). Arī pētījuma ietvaros veiktās anketēšanas laikā pedagogu atbildes ( $M=3,256$ ,  $SD=0,750$ ) apstiprina lasītprasmes sākumskolā saistību ar nesekmību vēlākojos izglītības ieguves posmos. Analizējot PMP riska faktoru "*pedagogu kompetence atpazīt PMP riskus jauniešiem*" secināms, ka nepieciešams paaugstināt pedagogu prasmes savlaicīgi identificēt PMP riskus.

Aptaujas rezultāti par iespējām jebkuru bērnu iekļaut vispārizglītojošā skolā ( $M=1,821$ ,  $SD=0,852$ ) liecina, ka nepieciešama padziļināta šī apgalvojuma izpēte. Lielākā respondentu daļa nepiekrīt apgalvojumam, ka pilnīgi visus bērnus iespējams iekļaut skolas vidē. Šobrīd bieži dzirdamas asas diskusijas par iespējām bērnu ar smagiem traucējumiem (attīstības, uzvedības) iekļaut vispārizglītojošās skolās, taču nereti diskusija ir par personāla nepietiekamību, nevis pašu iekļaušanas faktu. Izglītības iestādes iekļaujoša vide ir viens no izglītojamo labizjūtas faktoriem (Cefai, Simoes & Caravita, 2021). Savukārt izglītojamā labizjūta izglītības iestādē ir svarīgs faktors PMP novēršanā. Eiropas Savienības padome iesaka izglītības iestādēs sekmēt interaktīvas pedagoģiskās pieejas, lai veidotu izglītojamo autonomiju un atbildību par mācībām, tādējādi veicinot iekļaujošas vides veidošanu. Šādas pieejas var ietvert kombinētās mācīšanās

iespējas, digitālus resursus, piekļuvi bibliotēkām, laboratorijām, muzejiem, mūzikas skolām vai mākslas skolām, kopienu centriem un dabai, ņemot vērā starpdisciplināru, uz sadarbību vērstu mācīšanos un vienaudžu atbalstu (Eiropas Savienības Oficiālais vēstnesis, 2022).

Analizējot PMP riska faktoru “*slikts izglītības iestādes mikroklimats*” secināms, ka šis ir riska faktors, ko iespējams mainīt izglītības iestādes darbības rezultātā.

Piederības izjūta skolai ir saistīta ar izglītojamo ticību, ka vecāki un pedagogi rūpējas par viņiem mācību procesā, ir ieinteresēti viņos kā individualitātēs, kā arī sagaida viņu mācību sasniegumus (Bondare & Martinsons, 2017). Izglītības iestādes vide ietver gan fiziskos apstākļus, gan pedagoģiskos un sociālos apstākļus, kuros notiek izglītojamā izglītošana un audzināšana. Labvēlīgs skolas psihosociālais klimats un pozitīvi vērtējama skolas fiziskā vide veicina skolēnu labklājību. Pozitīvas emocijas var rosināt interesi, optimismu, lojalitāti, motivāciju darboties (Elksne & Rubene, 2018).

Arī pedagogu atbildes par izglītības iestādes mikroklimatu liecina par darbā gūto pieredzi, ka izglītojamo iesaiste mācību procesā ir saistīta ar drošības izjūtu skolā ( $M=3,164$ ,  $SD=0,699$ ), arī emocionālo drošību un atbalsta saņemšanas iespējām ( $M=3,328$ ,  $SD=0,662$ ). Jo drošāk izglītojamais jūtas skolā, jo vairāk viņš iesaistās mācību procesā, jo mazāks ir mācību pārtraukšanas risks. Kā liecina Eiropas komisijas kopsavilkuma ziņojums, izglītojamo drošības un piederības sajūtas veicināšana ir cieši saistīta ar jauniešu garīgo veselību. Izglītojamo garīgā veselība un labizjūta savukārt ir cieši saistīta ar mācību sasniegumiem (Cefai, et.al.2021). Jāatceras arī pētījumos secinātais, ka izvēloties izglītības iestādi savam bērnam, vecāki ņem vērā vairākus kritērijus, tai skaitā drošību izglītības iestādē, klimatu un reputāciju (OECD, 2018), tāpēc izglītības iestādes personālam svarīgi iesaistīties drošas vides veicināšanā savas iestādes attīstībai.

Tikpat svarīgi ir cieņpilnu attiecību veidošana ar izglītojamiem ( $M=2,974$ ,  $SD=0,899$ ). Pētījuma ietvaros veiktās aptaujas rezultāti liecina, ka tas mazina uzvedības pārkāpumus.

Pedagogu atbildes atbilstoši riska faktoram “*izglītības iestādes rīcība, atklājot bērnus ar speciālām vajadzībām*” liecina, ka lielākoties aptaujātie pedagogi zina par rīcību, atklājot bērnu ar kādām speciālām mācīšanās vajadzībām ( $M=3,236$ ,  $SD=0,841$ ). un saskata arī vecāku iesaistes nepieciešamību ( $M=2,256$ ,  $SD=0,847$ ) mācību grūtību pārvarēšanā.

Priekšlaicīgas mācību pārtraukšanas novēršanai svarīgi, lai izglītības iestādē būtu izstrādāta kārtība vai rīcības plāns gadījumos, kad kādam bērnam novērotas jebkādas grūtības mācību procesā. Savlaicīgai PMP risku novēršanai šis plāns ir jāpārziņina ne tikai personālam un izglītojamiem, bet arī vecākiem.

## **Secinājumi** **Conclusions**

Analizējot vispārizglītojošo skolu pedagogu atbildes, autore secina, ka izglītības iestādēs konstatējami riski, kas saistīti ar pašu izglītības iestādi. Liela uzmanība jāpievērš pedagogu kompetences agrīni identificēt izglītojamos, kas pakļauti PMP riskam, paaugstināšanai.

Pētījuma rezultāti liecina, ka mācīšanās grūtības izglītojamiem biežāk konstatē pēc sākumskolas pabeigšanas, taču ir svarīgi problēmas ieraudzīt agrīni, pat pirmsskolas posmā, tāpēc izglītības iestādē ir svarīgi izstrādāt kārtības vai rīcības plānu gadījumiem, kad pedagogam rodas aizdomas par izglītojamā mācīšanās grūtībām. Šis plāns ir jāpārzina ne tikai personālam un izglītojamiem, bet arī vecākiem.

Pedagogu aptaujas rezultāti liecina, ka pedagogi jūtas labi sagatavojušies darbam ar izglītojamiem, kam ir mācību grūtības, bet ne tik labi darbam ar izglītojamiem, kam ir uzvedības grūtības. Ņemot vērā lielo skaitu izglītojamo ar tieši šādām grūtībām, izglītības iestādēs darbiniekiem pastiprināti jāattīsta prasmes darbam ar bērniem, kam ir uzvedības problēmas.

Izglītības iestādes iekļaujoša vide ir viens no izglītojamo labizjūtas faktoriem. Ja izglītības iestādē izglītojamiem ir nodrošināts viņu vajadzībām nepieciešamais atbalsts, izglītojamie vairāk iesaistās mācību procesā. Izglītojamo iesaiste mācību procesā ir cieši saistīta ar piederības un drošības izjūtu skolā, arī emocionālo drošību un atbalsta saņemšanas iespējām. Pētījuma rezultāti liecina, ka pedagogiem ir izpratne par PMP riskiem, kas saistīti ar sliktu mikroklīmatu izglītības iestādē vai klasē.

## **Summary**

The article presents the results of the study about early school leaving risks related to educational institution, diverging comprehension of the problems related to at-risk youth among teachers and different approaches within each school to prevent early school leaving.

The method used in the research was questionnaires with closed and open questions. 195 teachers from comprehensive schools all districts in Latvia were involved.

In Latvia 6.7% of young people aged between 18 and 24 have dropped out of school early in 2022, 4.0% of which were girls and 9.3% were boys.

Early school leaving has consequences that affect both the individual and society as a whole. They have a significant impact on public safety, well-being and economic growth.

Risks of early school leaving, that are created or can be created by the educational institution itself (its staff or environment), are relatively little analyzed.

The analysis of the teachers survey showed the competence of the personnel of the educational institution to recognize such risks and a uniform policy of action in mitigating the revealed risks are essential for the identification of early school leaving risk factors in the work of an educational institution.

The results of the survey show that learning difficulties are most often detected after the completion of primary school, but it is important to see problems early, even in preschool.

The results of the teachers' survey show that teachers are well prepared for working with learners who have learning difficulties, but not so well prepared for working with learners who have behavioral difficulties.

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# INNOVATIVE SOCIAL WORK TECHNOLOGIES DURING MARTIAL LAW

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**Abstract.** *Innovative technologies in the field of social work play an important role in supporting the population in the conditions of martial law. Their introduction makes it possible to more effectively solve problems related to the humanitarian consequences of war and provide the necessary support to vulnerable population groups. Modern technologies can become a key tool for the work of social services in difficult conditions.*

*A period of martial law always leads to complex challenges for society, including social aspects. Children and young people, including those with disabilities, need special attention. The authors propose to consider modern technologies as a tool for improving social work with children and young people in the conditions of martial law. An important aspect will be the results and recommendations for social sector specialists regarding their implementation.*

*The purpose of the article is to define and substantiate innovative technologies of social work during martial law with children and youth, including persons with disabilities, and to provide recommendations for social sector specialists regarding the use of the outlined technologies in the social sector of the state and public organizations.*

*The article is devoted to the use of innovative technologies of social work for the development of conflict-free communication skills, effective communication, leadership and creative potential, as well as the involvement of young people in volunteering and social integration.*

**Keywords:** *effective communication, inclusion, social integration, technologies of social work, volunteering.*

## Introduction

Innovative technologies for social work include the use of modern tools, programs, and approaches to improve the processes of providing social services, facilitate more effective communication with clients, collect and analyze data, and provide greater accessibility and convenience for users. Technologies for the field of social work are constantly developing and becoming increasingly important for improving the quality and availability of social services.

Martial law is a difficult period for any country. It is accompanied by numerous social challenges that have a serious impact on the lives of citizens. In such conditions, social work is especially important, as it is aimed at providing assistance and support to vulnerable categories of the population. The solution of these social problems requires a scientific approach and research that allows us to understand the peculiarities of martial law and develop effective strategies for social work. (Mykolyuk, 2023)

The Law of Ukraine On the Legal Regime of Martial Law (Verkhovna Rada of Ukraine, 2015) considers martial law as a special legal regime introduced in Ukraine or in some of its localities in the event of armed aggression or threat attack, danger to the state independence of Ukraine, its territorial integrity and provides for the provision of the relevant state authorities, military command, military administrations and local self-government bodies with the powers necessary to avert the threat, repulse armed aggression and ensure national security, eliminate the threat of danger to the state independence of Ukraine, its territorial integrity, as well as a temporary restriction of the constitutional rights and freedoms of a person and a citizen, as well as the rights and legitimate interests of legal entities, with an indication of the period of validity of these restrictions, caused by a threat.

Social work with children and young people during times of war requires a special approach and a set of strategies, as members of these social groups may undergo significant traumatic experiences and need support and protection.

The purpose of the article: to define and substantiate innovative technologies of social work during martial law with children and youth, including persons with disabilities, and to provide recommendations for social sector specialists regarding the use of the outlined technologies in the social sector of state and public organizations.

### **The problem of research and scientific direction**

Many scientists study the technologies of social work, researching theoretical aspects and developing methodologies for their implementation in the context of work with children and youth, their social integration and involvement in volunteering. These studies help to understand how technology can be used to improve the quality and effectiveness of social work with children and young people. In general, research in the field of technologies of social work with children and youth helps to reveal the potential of technologies to promote their social integration and support their development.

Social work during armed conflicts and emergency situations becomes a priority of many public organizations. During the war, the social statuses and position of citizens change radically, and new vulnerable population groups appear. The number of people who need social support and protection is growing



rapidly, so the work of public, charitable and volunteer organizations is now at its peak (Shmorlivska & Strebkova, 2019).

The consequences of war are always catastrophic for all sections of the population, but young people bear them especially hard. Deterioration of mental health is one of the challenges facing girls and boys, so they need special support and attention. According to a national study, 82% of young people experienced losses due to the war - most often these are problems due to power outages - 46%, a decrease in income - 36%, deterioration of mental health - 29%, a break in relationships with friends or family members - 18%, separation from family - 18%, relocation to other settlements - 16%, death of friends or family members - 14%, mobilization in the Armed Forces - 9%, damage to housing - 6%, receiving injuries related to military actions - 6% (Volosevych, Kohut, Zher"obkina & Nazarenko, 2023).

The key aspect of the research is that 72% of the surveyed young people are ready to join the process of rebuilding the state in their community, which means that social work with the specified target audience is very important.

The technologization of social work, like any other activity in the social sphere, is a reflection of the objective requirements put forward by scientific, technical and social progress. It always has an innovative, creative character, because it is connected with the constant search for more perfect and, as a result, more effective ways of using human resources, its physical and intellectual potential (Shakhray, 2006). The introduction of innovative technologies when working with children and youth is an important aspect of the activity of a specialist in the social sphere, especially during martial law.

Social technologies are a set of methods, forms, techniques and influences used to achieve the goal of social development; an ordered set of procedures and operations, with the help of which a certain social project or a specific idea of transformation (reorganization, modernization or improvement) of social reality is implemented (Vainola, 2014).

Social work technology is a broad term that describes the use of various methods, tools and approaches to improve the processes of social service delivery and client support. The technology of social work is an algorithm of the actions, which results in achievement of a certain social goal and the transformation of the object of influence. This activity is not reduced to a one-time act, but is a process characterized by a change in content, forms, and methods that are repeated cyclically when solving every new task in the social sphere.

Classification of technologies in social work is needed for next reasons:

- it allows for organization of the technologies of social work according to certain criteria, which simplifies the choice of technologies and their practical use;

- shows for which category of the object and for which conditions of practical application social work technologies are available, and which ones are absent or their choice is limited;
- contributes to the creation of a bank of social work technologies taking into account their specific features.

The classifications of social work technologies can be very diverse.

Technologies of social work can be classified, first of all, depending on the understanding of social work in a broad and narrow sense.

If social work is understood broadly - these are technologies of social protection of all strata of the population, creation of such conditions (related to the essence and content of social policy) that would help reduce the share of the population that needs help and support. In the narrow understanding of social work these are technologies aimed at solving specific social problems of population groups or individual clients. These are technologies of a tactical nature, which are currently leading in the practice of social work. (Kaps'ka, 2004)

The classification of social technologies makes it possible to determine the following main types of social technologies: legal support for the functioning of society; political technologies of administrative regulation; economic functioning of society; information support by mass media and computer networks; spiritual and cultural development of society (Vainola, 2008).

Ukrainian scientists are actively researching the technologies of social work, studying their impact on the quality and efficiency of the provision of social services. Innovative technologies in social work can effectively integrate with existing frameworks of social work and social services, ensuring improved efficiency, accessibility and quality of services. When using certain technologies of social work, it is important to consider ethical aspects, as well as to ensure the availability of new solutions for different population groups. Such an integrated approach contributes to the improvement of the quality of social services and meets the challenges of modern society.

In our opinion, the use of innovative technologies of social work for the development of conflict-free communication skills, effective communication, leadership and creative potential, as well as the involvement of young people in volunteer activities and social integration during the war period is extremely important and relevant. Innovative technologies of social work aimed at volunteering and social integration can include a variety of approaches and tools aimed at facilitating interaction and support of vulnerable population groups.

One of the innovative technologies of social work is the technology of recruiting volunteers - it is an algorithm of the recruiting process, which contains a set of methods and tools for attracting young people to volunteering. The algorithm of volunteer recruitment technology is a set of interdependent and consecutive stages of the recruitment process, as well as methods of its implementation (Nahorna, 2022).

Since the first months of the war, volunteer initiatives that began to emerge in society turned into purposeful activities that were aimed at providing almost the entire spectrum of needs of both the security forces and citizens affected by military actions. The patriotic mood of the society, its cohesion and readiness to help, contributed to the increased number of volunteers, and the professionalism of the heads of volunteer organizations contributed to this process and played an important role.

The annual report of the World Giving Index helps to understand the development of volunteering in Ukraine for the period from 2010 to 2023 year, where in 2010 Ukraine took 150th place, and in 2023 it was placed second (Sudyn, 2022).

Also, according to the State Tax Service, the official register of volunteers was created in 2014 with the beginning of hostilities in the East of Ukraine, and by 2022 contained only 320 people. However, with the beginning of a full-scale war, this figure increased rapidly and already in 2023 there were 2,699 volunteers (Sirko, 2023). Therefore, volunteerism began to be perceived not only within the limits of one person and their desire to be useful, but on the scale of the country and the manifestation of will of the entire nation, society, community. Volunteering has become a manifestation of social cohesion and a tool for influencing the current situation in the country, society, and community.

These are just a few examples of scientists who are actively researching social work technologies. These scientists and many other Ukrainian researchers actively contribute to the development and improvement of social work technologies in Ukraine, studying their possibilities and limitations, as well as looking for innovative approaches to solving social problems.

### **Research methodology**

When writing this article, theoretical methods (analysis, systematization, generalization) were used to outline the tasks. The authors carried out a theoretical and methodological analysis of research and scientific works on the activities of a social worker with children and young people in the direction of the development of volunteer activities, conflict-free communication skills and social integration of people with disabilities.

### **Discussion**

The war in Ukraine has exacerbated the needs and vulnerabilities of children and young people, including people with disabilities, and increased their risk of discrimination.

The process of involving young people in volunteering, the development of non-violent non-conflict communication skills has a significant impact on their

social integration and plays an important role in personality development, especially in the conditions of martial law.

One of the indicators and important factors of social integration of children and young people is activity and diverse participation in social life.

Analysis of the latest research and scientific publications made it possible to consider this issue more comprehensively. Thus, the scientist I.V. Shaposhnikova notes that the main criterion of social integration is "the degree of inclusion of a person in the social structure and the degree of identification with this structure by assimilating its values and norms" (Shaposhnikova, 2012).

In our opinion, the criteria for social integration of young people with disabilities are generally summarized by the modern scientist T. Martyniuk. In his work, he lists the following points: the nature of self-attitude and self-perception of young people with disabilities, value orientations and motivation for change of young people with disabilities, the effectiveness of social support networks of young people with disabilities, the subjectivity of young people with disabilities, the manifestation of social activity of young people with disabilities in animation activities (Martyniuk, 2020).

O.P. Hlova and M.O. Myroshnichenko in their works also emphasize the outlined criteria of social integration, but they focus on the level of self-esteem of young people with disabilities, which, in our opinion, does not allow us to adequately assess the process of social integration of young people with disabilities and demobilized servicemen (Hlova, 2011; Myroshnichenko, 2008).

Based on the statements above and the analysis of scientific research, we consider it appropriate to propose the following criteria for determining the level of social integration of young people with disabilities:

- emotional and motivational criteria - describe personal qualities and focus on the presence and degree of a person's desire for self-realization, the desire for approval and the ability to self-control;
- behavioral criteria - outline behavioral competencies. This includes the degree of readiness for work, adaptability and readiness to adapt to new situations;
- communicative criteria - communicative skills of the individual, for example, the ability to communicate without conflict, interact with others, and present oneself;
- personal criteria - a group of criteria characterizing the presence of certain personal traits, such as independence, confidence, determination (activity) and responsibility;

The criteria outlined above allow for the maximum realization of both personal potential and the level of social integration. This is due to the fact that the level of social integration of an individual depends not only on external factors, but also on his personal characteristics.

Volunteering plays an important role in promoting social integration. It can be an effective tool for improving the quality of life and bringing together different population groups. To support social integration, promoting mutual understanding, cooperation and mutual assistance between different population groups, it will be appropriate to use volunteering, as one of the powerful tools of working with children and youth, community and society.

Volunteering is a form of voluntary activity where people voluntarily give their time, knowledge and skills to help and support other people or the community without financial reward. Volunteers work for free and give their efforts to improve the situation in society, develop the community, provide assistance to the needy and implement various projects. Volunteer activity is a voluntary, socially oriented, non-profit activity carried out by volunteers through the provision of volunteer assistance (Sirko, 2023).

Volunteer activity is a way of supporting, caring for, and providing assistance to members of the community; interaction between people to jointly develop new ways of solving problems that arise (Lyakh & Spirina, 2021).

Volunteering is one of the manifestations of leadership qualities, an active civic position and public dialogue, which is the response to the challenges of the social protection system. During the war, Ukraine needs as many volunteers, public organizations, and volunteer initiatives as possible, who direct all their resources to solving local or global social problems, through volunteering, as a technology of social work.

Involving children and young people in volunteering can be beneficial both for the children themselves and for the community as a whole. There are several ways that can be effective for attracting children and young people to volunteer activities and their social integration into society, for example, creating interesting initiatives: organizing volunteer projects that meet the interests and needs of children and young people, promoting the development of support for volunteer activities at the local communities, providing appropriate training and support, create special programs for younger volunteers, develop volunteering programs that take into account the characteristics of age groups and provide opportunities for children to contribute to the community.

Involvement of children and young people in volunteering can not only help promote social integration and education of civic consciousness, but also develop their social, communication, leadership skills, promote understanding of the importance of mutual aid and give them the opportunity to make a positive impact on the world around them. The development of communication skills and leadership potential in children and youth is an important aspect for their involvement in volunteering and social integration.

A holistic approach to social assistance during martial law includes a set of measures and programs aimed at ensuring the basic needs of the population, preserving social stability and restoring the normal functioning of society. One of

the important points is that a holistic approach involves the interaction of different sectors - the government, the non-profit sector, the public and international partners - to achieve the common goals of social assistance in the conditions of martial law and the integration of innovative technologies of social work into society.

### **Conclusions and suggestions**

The analysis of theoretical and methodological literature and publications demonstrates the importance of working with children and youth during the war, using innovative technologies of the social sphere.

This article can be useful for specialists in the social sphere, teachers, as well as any person who is interested in the development of communication skills and leadership potential in children and youth in order to involve them in volunteering and social integration.

The authors of the article formulated recommendations for specialists in the social sphere regarding the use of the outlined technologies in the social sector of state and public organizations when working with children and youth. Therefore, attracting children and young people who will be motivated and interested in volunteering for social integration can be a difficult task. There are some effective strategies and guidelines that can help social workers:

- Creating engaging programs: Develop volunteer programs and activities that are engaging for children and youth, taking into account their interests and needs. For example: sleepaway camps for adolescents - a program that can be aimed at creating the safest possible environment to support adolescents in overcoming traumatic events related to war, as well as to prevent long-term psychological consequences.
- Providing support and training: Provide children and young people with the necessary support and training for participation in volunteering projects, including coaching, training and mentoring.
- Encourage participation through incentives: Use various forms of incentives, such as certificates, awards or recognition of achievements, to encourage participation in volunteer activities.
- Family and community involvement: Involve society and the community in the development and implementation of volunteer projects, creating opportunities for joint participation, support and development. For example: the organization of volunteer activities in communities affected by war for the restoration of housing, communal enterprises, community infrastructure, integration of internally displaced persons into the host community, etc.

- Use of innovative technologies: Use interactive and gaming technologies, as well as social media, to engage children and youth in volunteering and communication.

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# (UN)USED POTENTIAL – THE PROCESS OF BECOMING INDEPENDENT BY YOUNG-ADULT FOSTER CARE CHILDREN

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**Abstract.** *The transition to adulthood of young people leaving foster care is an important research topic. The results of many international studies show that care leavers are at high risk of social exclusion. In 2023, an amendment to the Act on foster care was introduced in Poland to increase the number of successful transitions into adulthood. The aim of the empirical study we undertook was to analyse the relevance of long-term care solutions implemented in Poland for children leaving foster care, from the perspective of professional caregivers of the process of becoming independent. The study had the character of a field reconnaissance (Minski, 2017), as it allowed us to verify the issues undertaken before the next stage of the research. We decided to conduct individual in-depth interviews with guardians of empowerment. Our research shows that, despite many pertinent statutory solutions, in practice the system does not work as it should. The main problem is the systemic marginalization of carers' problems and the lack of substantive and psychological support for them.*

**Keywords:** *care leavers, foster care, process of gaining independence, transition to adulthood.*

## Introduction

In many countries, and not only the European ones, there has recently been an increasing interest in the processes of entering adulthood and becoming independent by young-adults. As J. Grotowska-Leder (2019) claims, this is because the course of human life which covers three major phases – youth, adulthood, old age – becomes more complicated due to the increasing dynamics of social life triggered by several processes, including economic modernization and the accompanying transformation of the labor market, individualization of life, but also globalization and migration. The contemporary destandardization of the normative model of entering adulthood (Grotowska-Leder J., Rek-Wozniak M., Kudlinska I. 2016; Kohli, 2007), including: completing education, leaving the family home, running one's own household, taking up professional activity, starting a family, results in the emergence of new phenomena in the process of becoming an adult, such as: delayed adulthood (Brzezinska, 2017), nesting (Piszczałowska-Oleksiewicz, 2014), *transitional yo-yo effect* (Winogrodzka &

Sarnowska, 2019) and others, like returning young adults syndrome (Schnaiberg & Goldenberg, 1989). They prove that modern adulthood is changing its shape, pace and punctuality, and the patterns of paths leading young people to independence are becoming more and more diverse.

As Kudlinska-Chroscicka (2019) and A. Golczynska-Grondas & M. Błaszczuk (2020) report, changes in the determinants and the course of transition into adulthood do not apply to young people from non-privileged groups, including those raised in care-and-education facilities. In their case, destandardization of the normative model of transition into adulthood is marginalized by public policies, whereas the proposed systemic solutions "push" young pupils, who are not ready for adult responsibilities, into adult life.

Amended in Poland in 2023 The Act on Foster Care (Kancelarija Sejmu, 2014) has introduced several significant changes that have been postulated for years by practitioners and researchers and are expected to increase the number of successful transitions into adulthood for foster care children. Six months after the implementation of new legal regulations, we have started research aimed at assessing the accuracy of the legally adopted solutions. In the first stage of the survey reported in this article, we have conducted *Individual In-Depth Interviews* with supervisors of the independence process. We wanted to find out how existing solutions in the field of long-term care for pupils leaving foster care are perceived by persons acting as professional supervisors of independence, determine which legal and institutional solutions aid and which block the support system for young pupils in pursuit of becoming independent, and which practices in the process of entering into a self-dependent life should be promoted and disseminated?

### **The process of becoming independent by foster care pupils – legal and organizational framework**

Data from the Statistics Poland (Główny Urząd Statystyczny, 2022) inform that at the end of 2022, there were 72.8 thousand pupils in the foster care in Poland, including 56.2 thousand in family care and 16.6 thousand in institutional care. About 6,000 of them reached adulthood. The pupils over 18 years of age can start an independent life outside the facility, and those who want to continue their education can receive assistance until they are 25 years old.

The course and forms of support for children becoming independent from care facilities are regulated by the Act on Family Support and the Foster Care System of June 9, 2011, as amended. However, as P. Chrzanowska (2017) emphasizes, the legal provisions lack an explicit definition of the process of becoming independent that would describe its components, a pattern of its course and outcomes that would allow for a clear determination of whether the process has turned a success or a failure.

The analysis of the provisions of the Act enables stating that, undoubtedly, the process of entering into a self-dependent life consists of two stages: (1) before the pupil reaches the age of majority in the facility, and (2) after leaving the facility (after reaching the age of 18 or until 25 years of age if the pupil continues education).

The aim of the first stage preparing the pupils to enter into adulthood is to develop an individual independence program (IIP). The IIP is a type of contract prepared by the person wishing to become independent together with the independence supervisor, at least one month before the pupil reaches the age of majority. Work on the IIP is intended to enable a person entering into self-dependent life to recognize their own resources and limitations in basic areas of life as well as to plan their future life and educational path, and is the basis for applying for financial benefits granted for continuing education, development, and appropriate housing conditions.

An important role in constructing and monitoring the implementation of IIP is played by the independence supervisor. The supervisor is chosen by the pupil at least one year before they reach the age of majority. The supervisor's tasks include supporting the person becoming independent in IIP preparation, assessing IIP implementation, introducing possible modifications, providing opinions on applications for financial assistance in becoming independent and continuing education. A supervisor may be chosen from among persons creating a foster family, running a family children's home, a coordinator of family foster care, a social worker of a district family support center, a person who is an educator or a psychologist in a care-and-education facility or a regional care and therapeutic facility, an employee of a non-governmental organization or another person designated by this organization to act as a supervisor of independence. The supervisors do not receive additional salary and their work is not formally assessed, but it falls under indirect assessment due to the undertaken obligations expressed in the achievements of the pupils being empowered (final assessment of succeeding in the process of becoming independent).

The aim of the second stage of the process of becoming independent is to achieve the goals set in the IIP from the moment the pupil leaves the facility until he or she reaches relatively completed adulthood.

As previously mentioned, the amendment to the Foster Care Act of 2023 (Kancelarija Sejmu, 2024) introduced several changes to the provisions regulating the process of becoming independent for foster care pupils. The new regulations allow for a one-time return of a person who has left the foster care to the current foster family or facility, and for persons with a significant or moderate degree of disability to remain in the current form of foster care without having to meet the requirement of continuing education at the same time. The income criterion of PLN 1,200, which was taken into account when granting assistance for becoming

independent and for installation assistance to persons becoming independent (i.e., persons leaving foster care after reaching the age of majority), was also abolished.

The scope of the introduced statutory changes is consistent with the policy of deinstitutionalization of foster care implemented in Poland since 2012. However, not only the developed legal provisions, but also real possibilities of their implementation into the foster care system and the development of systemic practices to support young-adults and their supervisors in the difficult process of achieving independence in life are important for the successful transition of pupils into adulthood.

## Methodology

The process of becoming independent by foster care pupils can be analyzed from many perspectives. One of them, crucial for monitoring the introduced systemic changes, is the perspective of the supervisors of the independence process, i.e., persons employed in various institutions and organizations who assist the pupils on a daily basis in the process of preparing for an independent life and support them in solving problems they face in everyday situations.

The aim of the empirical survey undertaken by a team of Polish researchers<sup>1</sup> was to analyze the accuracy of the solutions implemented in Poland in the field of long-term care for children leaving foster care, from the perspective of professional supervisors of the independence process.

At the conceptualization stage, the scope of the addressed research issues was determined by the following questions:

1. How are existing solutions in the field of long-term care over children leaving foster care facility perceived by persons acting as professional supervisors of the independence process?
2. Which legal and institutional solutions aid and which block the support system for pupils in their pursuit of becoming independent?
3. Which practices developed in various forms of foster care regarding the process of becoming independent should be promoted and disseminated?

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The survey's nature was a field reconnaissance (Minski, 2017) as it enabled to verify the addressed issues before the next stage of research. That is why, we have decided to conduct individual, in-depth interviews with independence supervisors. In-depth interviewing is a qualitative research technique that involves conducting intensive individual interviews with a small number of respondents to explore their perspectives on a particular idea, program, or situation (Boyce & Neale, 2006, p. 3).

Many researchers (Guion, Diehl & McDonald, 2001; Boyce & Neale, 2006; Minski, 2017) recommend that a more or less structured interview guide be prepared before conducting an interview. Thanks to this, topics important to the researcher will not be omitted during a casual conversation. The guide prepared for the needs of this survey consisted of three parts: (1) an introductory part, in which we asked the interlocutors to present the organization in which they work, their role/function in it, and the circumstances of making the decision to act as a supervisor of the independence process of a foster care pupil; (2) the main part, which included questions exploring the research field, allowing the respondents to describe their experiences and reflections, and (3) the summary part, in which we asked them to complete their statements, and provide their comments and suggestions. The prepared guide served only as an auxiliary tool and was dynamically modified depending on the course of the conversation, the answers given by the respondents or threads introduced into the conversation that were not taken into account at the stage of guide preparation.

The interviews, with the consent of the respondents, were recorded on a dictaphone and then transcribed. The collected text material was subjected to the thematic inductive analysis (Braun & Clarke, 2006). In the inductive analysis, the data is coded without trying to fit the themes into a pre-existing coding frame or the researcher's preconceptions about the research. So, themes emerge through the data itself without paying attention to the themes included in other studies. Themes are strongly linked to the data instead of the researcher's theoretical interest in the topic (Dawadi, 2020, p.63). The process of analysis was divided into 6 stages: (1) familiarizing with data: transcribing data, reading and re-reading the data, noting down initial ideas; (2) generating initial codes; (3) searching for themes, (4) reviewing themes: checking if the themes work in relation to the coded extracts (level 1) and the entire data set (level 2), generating a thematic 'map' of the analysis; (5) defining and naming themes; and (6) producing a report.

Table 1 **Guide matrix of the main part of the interview** (made by authors)

Research question	Information sought	Questions asked to the interlocutor
1.	<ul style="list-style-type: none"> <li>– motivation behind taking the role of a supervisor of the independence process</li> <li>– reflections and experiences after the amendment to the Act</li> <li>– experience</li> <li>– the needs of the supervisor and the pupil, the possibilities of meeting them in the new legal situation</li> <li>– cooperation with other persons and entities potentially involved in making successful transitions</li> </ul>	<ol style="list-style-type: none"> <li>1. How can you describe your experience so far as an independence supervisor?</li> <li>2. How did the amendment to the Act affect your work with a pupil who is becoming independent?</li> <li>3. Whose help do you use/would you like to use when acting as an independence supervisor? What type of support do you need most?</li> <li>4. What difficulties do you encounter in direct work with a pupil, and how do you solve them? What are your goals?</li> <li>5. What institutions/organizations/persons could be engaged to cooperate in the process of becoming independent by pupils to enable their successful transition into adulthood?</li> </ol>
2.	<ul style="list-style-type: none"> <li>– assessment of the adopted legal and institutional solutions and their adequacy, and effectiveness of the actions taken.</li> </ul>	<ol style="list-style-type: none"> <li>1. Which legal and institutional solutions do you think support the process of independence?</li> <li>2. Which legal and institutional solutions block /impede the process and what would you change?</li> <li>3. How do you assess the recruitment system for independence supervisors, what would you change, and what works?</li> </ol>
3.	<ul style="list-style-type: none"> <li>– good practices worth disseminating</li> <li>– ideas worth pursuing/ implementing in the future.</li> </ul>	<ol style="list-style-type: none"> <li>1. What changes would you expect in the activities of your institution that would allow the pupil to be better prepared for independence?</li> <li>2. What activities undertaken by you/institutions are worth promoting?</li> <li>3. Referring to your own experiences, what ideas do you have that could be implemented in the future in your institution, in the entire care system and in the process of becoming independent?</li> <li>4. What role can/should the local community play in the process of becoming independent by foster care pupils?</li> </ol>

### Study sample

The provisions of the amended Foster Care Act do not specify recruitment procedures for fulfilling the role of a supervisor of the independence process. Art.

145 of the Act specifies a group of employees of social welfare institutions and governmental and non-governmental organizations who can be entrusted with such a function. The current foster care system consists of family and institutional care. Forms of care within a family include foster families (related non-professional; professional, including families acting as family emergency, as well as specialist and family foster homes). In turn, institutional forms comprise educational care facilities, regional care and therapy centers, and intervention preadoption centers. An educational care facility can provide educational care in terms of socialization, intervention, specialist therapeutic activities or family. An educational care facility can combine the functions of different facilities (Ruszkowska, Lovasova 2023, p. 223). Given the above, we have decided to invite employees representing various institutional foster care environments to participate in the survey.

Using the register of regional care and therapeutic facilities and pre-adoption intervention centers in the Warmian-Masurian and Masovian Voivodeships, we selected care institutions and then asked their employees for consent to participate in the research. When selecting the sample, we were guided by two criteria: (1) acting as a supervisor to help a foster care pupil become independent and (2) having at least 3 years of work experience in care facilities or social welfare institutions. As a result, we conducted 6 individual in-depth interviews with independence supervisors employed at County Family Assistance Centers (3 persons) and family-type care and educational facilities (3 persons).

### Research results

The thematic analysis conducted allowed us to distinguish 4 main thematic groups, shown in Figure 1.

Generally, the surveyed supervisors of the independence process do not report an urgent need to introduce new legal solutions to organize the process of reaching independence, although, as they emphasize, they encounter a number of difficulties in their daily work during IIP preparation and implementation. Many of these difficulties stem from the desire of pupils, especially those staying in institutional foster care, to start an independent life as soon as possible. However, this does not mean, as the respondents emphasize, that those under their care who reach the age of majority are well prepared for independent living.

*Pupils appoint a supervisor of their independence process at the age of 17, so tell me, what do they know about life then? They know so little, even how to cook and pay bills, when we prepare IIP sections related to moving out and potential place of living, we cannot force them to meet our expectations, and everyone is waiting for them to turn 18, finish school and cope by themselves, this is often our reality (Ewa)*

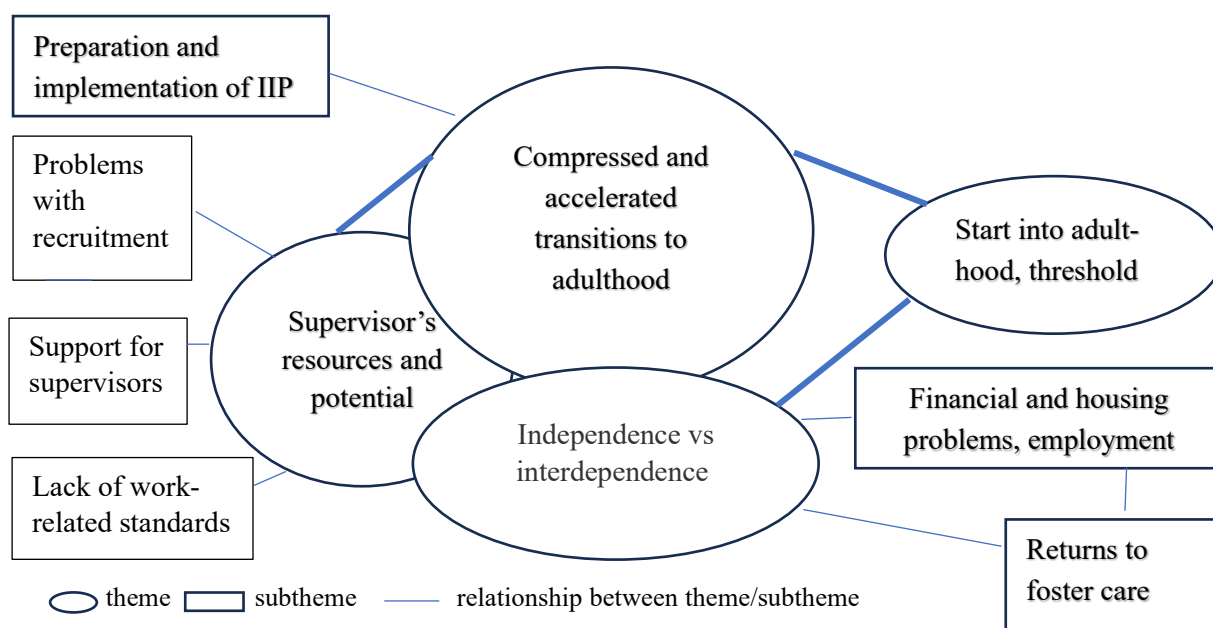


Figure 1 **Thematic map demonstrating four main themes** (made by authors)

When preparing an IIP with a pupil, it is necessary to design solutions that are realistic in the conditions of a given local community, ensuring appropriate housing, financial and employment conditions for the pupils. Their fate at the beginning of their adult lives, as well as their biographical experiences are very diverse. Unfortunately, the provisions regarding support for pupils pursuing to become independent do not always allow for an individualization of the independence plan in accordance with their current legal, financial and housing situation.

*Sometimes the payment of benefits is delayed, even by several months, which is a serious threat/problem to a pupil who leaves the facility because he/she has no other sources of income (Julia)*

As other international research shows (Stein, 2006; Cameron et al., 2018), the entering into adulthood is a compressed and accelerated process for foster care children. Within a very short period of time, pupils must undertake all the tasks of adulthood, which are often simply beyond them.

*For example, we cannot apply for social housing for a pupil before he/she turns eighteen, so this is also a regulation that is not entirely good because, on the one hand, it requires the pupil to leave the facility and only then start applying for an apartment, while we know a year beforehand that he/she is leaving us, so we could look for this apartment throughout this year. Yes, indeed, we have such a comfortable situation now that the pupils receive funds from the “500 plus” program and this money is some kind of security there, at least when renting a room, sometimes it happens that the pupils return to their family and with the*



*money they receive from the Municipal Social Care Center (MOPS), their room is renovated and equipped with electronic devices or household appliances (Anna).*

The unfavorable situation of pupils in pursuit of becoming independent is intensified by emotional problems and low social competences in terms of their independence in life. If the pupils start their independent life without a safe and supportive foster environment, they may feel fear of abandonment and loneliness in the process of becoming independent as a result of their childhood experiences and traumas. In practice, the IIP is insufficiently personalized and does not enable practicing adulthood in the form of the so-called extended dependency. As the respondents argue, preparation for entering into adulthood cannot take place only in the conditions of institutional care. Supervisors recognize the need to “buffer” the process of becoming independent by increasing the number of places (e.g., training apartments, supportive housing) where pupils could develop competences necessary in everyday, independent life in safe and supported conditions, outside the facility.

*The point is for the pupil at this last stage, before reaching the age of eighteen, to acquire as many social competences as possible, which he/she is not able to develop in a care and educational facility; the facility is a place where a lot of things happen in a closed group of pupils, therefore we of course try to “push” children outside for additional activities, for social contacts to take place outdoors, not only in groups. Their social competences are great at the level of a small group where they know all of us, but the problem begins when they have to enter the office to take care of things for themselves because they are adults, find their way among people, officials, co-staff in the workplace, when they change schools or go to an outpatient clinic or to a doctor (Paweł)*

Having a quite realistic picture of the readiness of pupils to start adulthood, supervisors try to encourage them to postpone the decision to become independent and take actions that increase their chance for a successful transition (continuing education, participating in workshops, vocational training, etc.). Unfortunately, the principles of operation of care-and-education facilities are not consistent with the different developmental needs of pupils of different ages. It is not a surprise that young people demand a constant expansion of dependence, as happens in well-functioning biological families, along with progressive changes in the physical and psychosexual maturation of young people. The rigidity of the facility’s rules and regulations, which impedes the possibility of “trying out adulthood”, discourages many pupils from the transition into adulthood, and thus increases the risk of their unsuccessful start into adulthood.

Attempts to solve the problem of failures of foster care pupils in becoming independent resulted in the inclusion of a provision in the amended Act on the possibility of a one-time return of foster care pupils (in justified cases). The return has to be approved by facility’s director and the city major. According to supervisors, however, it remains a dead provision in most cases.

*Indeed there has been a provision on return, in force since twelve months, but it has not been formulated in such detail (.) Maybe that's a good thing (.) because the final decision is made by the director, the only problem is that in order to admit a pupil who has become independent back to the facility, you have to have vacancies, but there are no such places, and this is actually a dead provision, because when a pupil leaves the facility, the director must accept a new one in that place, whereas he can only accept an adult pupil when there is a vacancy but usually there are no vacancies. [...] and there are a dozen or so underage children waiting for their turn to be admitted to the facility in our city and we cannot add, for example, one bed in a room because the law limits the number of children in the facility (Paweł)*

A topic that appeared many times in various parts of the respondents' statements was the lack of statutory regulations regarding recruitment standards, task implementation and care for the well-being of independence supervisors.

The Act on Foster Care, apart from indicating the groups of employees who can take on the role of a supervisor, does not regulate the scope or forms of their work or any financial gratification for work on the preparation and implementation of IIP.

*In fact, the tasks of the independence supervisor do not stem from the regulations in any way. There is no catalog of what a supervisor should do, what competences, predispositions he/she should have, what he/she should actually do, the law only states that the pupil should appoint a supervisor within a statutory period of time and that is where it really ends (Anna).*

For the independence supervisor, a good practice in institutional foster care is to be an educator with whom the pupil has established an open and trusting relationship over the years.

*The leading educator becomes the supervisor of independence because he/she knows the most about the child, and more often than not, the closest relationship is built between the leading educator and the child, because we, as the tutors, are responsible for everything: from everyday activities to court cases, through decisions and sometimes fighting for the children to contacts with parents and external institutions, so we actually have the greatest knowledge about the child's possibilities, because becoming a supervisor of independence involves at some point making a difficult decision about what to do next with the child (Igor).*

In the case of social workers employed at Poviats Family Care Centers (PCPR), the main factor determining the choice of a supervisor is the opinion about them in the local environment, related to their official efficiency and personal commitment as well as the ability to take actions to support pupils in pursuit of becoming independent.

*They come to me rather by "from word of mouth" recommendation. Recently, a grandmother came to say that she explained to her grandson that if he should choose a supervisor, he should only take Mrs. Julka from PCPR, that he should*

*deal only with Mrs. Julka because she is the best, she can take care of everything.* (Julia).

According to the respondents' statements, a drawback of the process of becoming independent is the lack of a system for recruiting independence supervisors and/or the low quality of this support as well the lack of any financial benefits for the tasks undertaken. As a result, the choice of a supervisor is often random and inadequate to the needs of the person striving to become independent. Even if educators have a bond with the pupil, their ability to support the child who becomes independent is limited when they are overloaded with current tasks at the facility. In the event of a random selection of a supervisor from the group of PCPR social workers, their role is limited mainly to providing opinions on applications for financial assistance to continue education or become independent.

The phenomenon of non-exploiting the potential of independence supervisors, observed in the respondents' statements, stems from the lack of legislators' concern over the well-being of supervisors. As indicated by the respondents, the psychological costs resulting from providing care and responsibility for the success of pupils in becoming independent include: deterioration of functioning at work, somatic ailments, sleep disorders, etc. The support they receive from colleagues in their work teams, although extremely important for efficient operation in the organization, is not always sufficient to maintain the optimal level of their psychological well-being.

*We, as a team, provide each other with all kinds of support, because in a problematic situation we also have a rule that no one is left alone [...] we are a form of support group for each other* (Ola).

Supervisors also report the need for specialized training as part of the professional development path, specific to the problems of the independence process, aimed at maintaining and strengthening their competences in providing support, searching for sources of difficulties at work and means to overcome them.

## Conclusions

Our preliminary analyses of the accuracy of existing solutions in Poland in the field of long-term care for children leaving foster care, made from the perspective of professional supervisors of independence, prove that despite many accurate statutory solutions, "in practice, the system does not work as it should" (Fundacja Dobrych Inicjatyw, 2023, p. 8).

At the same time, answering the questions posed earlier, the conclusions from the research can be summarized as follows. Persons acting as professional independence supervisors indicate that the existing legal solutions in the field of long-term care for children leaving foster care (even after the amendment) do not eliminate the shortcomings of the entire system. The resources of local governments lack social housing and training apartments where pupils could

safely “practice adulthood”. Insufficient state support for foster families, lack of places in institutional forms of foster care, resulting in minors waiting for a place in a family or institutional care facility, in practice block the implementation of the provision on the possibility of return of a person becoming independent to the facility and obtaining support in a difficult life situation.

In turn, when it comes to legal regulations in foster care, our findings show that the most neglected area of the independence process is the lack of regulations and practices regarding recruitment, work standards and support for independence supervisors. The systemic marginalization of their problems and lack of substantive and psychological support for them are the most urgent, yet solvable problems, affecting the success of foster care children transition into adulthood.

Although, in the opinion of respondents, the legislative amendments introduced in 2023, including the declared increase in financial outlays and remuneration for foster families and the pursuit of further deinstitutionalization of the system, are conducive to increasing the chances for a successful transition into adulthood for foster care pupils, they are still insufficient.

In this situation, it is worth disseminating good practices regarding the transition process. One of them is to ensure that the supervisor of independence is the educator or another person with whom the pupil has actually built a lasting relationship. It is also important to secure an appropriate number of places, always available for pupils returning to facilities in difficult life situations.

The research reconnaissance carried out by our group indicates the need for continued investigations focused principally on diagnosing the needs of independence supervisors and the standards of their work as well as the systemic organization of substantive and psychological support.

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# **SOCIAL EXCLUSION AMONG PEERS AS A FORM OF EXPRESSION OF BULLYING IN A PRE-SCHOOL EDUCATION GROUP**

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**Abstract.** *Bullying in preschool age often manifests itself as an indirect form of bullying – i.e. by social exclusion. Experiences of social exclusion in early childhood can have a negative impact on social development, future relationships and emotional well-being of a child. In order to reveal social exclusion among peers as an expression of bullying in the preschool education group, an approach of qualitative research was used. Analysis of a semi-structured interview and pedagogical observation data revealed the following forms of expression of social exclusion among peers as bullying: exclusion from a game/refusal to play together, showing physical distance or verbal resistance to friendship. It was revealed that the initiators of social exclusion among peers are usually 4-5 years old children with excessive mobility and dominance. The results of the study research made it possible to highlight the following factors of social exclusion: special educational needs and certain personality characteristics (aggressiveness, high self-confidence, closedness, sensitivity).*

**Keywords:** *bullying, peers, preschool group, social exclusion.*

## **Introduction**

The European Union's Children's Rights Strategy emphasizes that pre-school education is particularly beneficial for cognitive, language and social development of children, but it is also recognized that there are still significant differences in ensuring appropriate conditions for children's well-being in the countries of the European Union (European Commission, 2021). The strategy emphasizes the inconsistencies of the legal framework in ensuring the safety, equality and well-being of preschool children in the education sector. On Recommendations for the Implementation of Violence Prevention at Schools' envisages the creation of an environment safe from violence and bullying at schools, emphasizing the application of these recommendations in pre-school educational institutions as well (Lietuvos Respublikos Švietimo ir mokslo ministro įsakymas, 2017).

Researches reveals that bullying among preschool children has its own expression and characteristics (Davis & Gere, 2018; Hwang & Markson, 2020; Rosen, Scott & Higgins, 2023). Due to the peculiarities of preschool children's development, it is difficult to talk about conscious, intentional action in bullying situations and to identify children's aggressive behavior as bullying. However, researchers tend to single out social exclusion as one of the most manifested forms of bullying at preschool age (Enlebaas & Killen, 2016; Skoglund, 2020). It has been identified that social exclusion experienced at an early age affects the development of relationships in the future, has an influence to a child's low self-esteem, social isolation, anxiety, and depression (Ladd, Ettekal & Ladd, 2017; Brendgen & Poulin, 2018; Davis & Gere, 2018; Lee, 2020). Depressive thoughts and feelings when experiencing exclusion in a peer group puts an abused child at risk of being bullied in other social groups in the future (Brendgen & Poulin, 2018).

Bullying in preschool education institutions has been analyzed only fragmentarily by Lithuanian researchers, paying attention to the following aspects: manifestation of bullying among 3-6 years old children (Kerulienė & Užpurvytė, 2017); to the forms of aggressive behavior and the possibilities of their correction among 4-5 years children (Ciparytė & Bagdonas, 2019); to the development of empathy and kindness (Larkina & Valaitienė, 2021; Auškelytė & Valaitienė, 2020), to the theoretical assumptions of violence and bullying prevention (Klanienė, Saveljeva, Skališienė, Stupurienė & Žičkienė, 2022). There is a lack of systematic and consistent research on peer social rejection as a form of bullying expression in preschool age, which could lead to the application of useful bullying prevention strategies in preschool education institutions.

Scientific debates highlight the demand and significance of preschool bullying research (Ozsahin & Yayci, 2021; McGoey, Aberson, Green, & Stewart, 2023) and draw attention to the links between social exclusion and preschool bullying (Koyuturk Kocer & Gultekin Akduman, 2019; Hwang & Markson, 2020; Skoglund, 2020). Bullying in pre-school education institutions has been analyzed only fragmentarily by Lithuanian researchers, paying attention to the following aspects: an expression of child bullying among 3-6 years children (Kerulienė & Užpurvytė, 2017); forms of aggressive behavior among 4-5 years children and the possibilities of their correction (Ciparytė & Bagdonas, 2019); the development of empathy and kindness (Larkina & Valaitienė, 2021; Auškelytė & Valaitienė, 2020) theoretical assumptions of violence and bullying prevention (Klanienė et al., 2022). It is observed that there is a lack of systematic and consistent research on social exclusion among peers as a form of bullying expression in preschool age, which by removing it could lead to the application of useful bullying prevention strategies in preschool education institutions.

*The problem of the research.* Bullying at preschool age lacks sufficient attention from researchers. It is observed that many researches focus on the

expression and prevention of bullying at school age, but an aspect of bullying at preschool age is being actualized more and more often. Therefore, there is a goal to reveal social exclusion as one of the forms of preschool bullying, and is hoped that this would help to better understand and reveal the phenomenon of bullying of preschool children and predict its preventive opportunities.

*The purpose of the research* is to reveal social exclusion among peers as one of the forms of expression of bullying in a preschool education group.

*Research methods:* systematic analysis of literature, semi-structured interviews, pedagogical observation and qualitative content analysis.

### **Theoretical presumptions of social rejection as a fundamental form of bullying at preschool age**

Bullying at preschool age is still a matter of much scientific debate, the characteristics of a child's mental development at this age make it difficult to identify a child's aggressive behavior as bullying (Ozsahin & Yayci, 2021; McGoey et al., 2023). I. Klanienė et al., (2022) state that the manifestations of bullying can be already observed at an early age, but we cannot consider them as bullying until such a phenomenon meets scientifically based bullying criteria (intentional action, repeatability, power imbalance). At preschool age, children are not yet able to fully understand their intentions, i.e. an important element identifying bullying - the conscious intention to hurt, injure, etc. is eliminated. By behaving aggressively, children understand that they behave inappropriately and experience unpleasant feelings, but, due to their natural egocentrism, they are not yet able to understand the negative consequences they have caused to another child (Swit, 2018; Saracho, 2017), i.e. children have not yet reached such a level of awareness that they could realize that they are doing it on purpose, with the aim to hurt another child.

However, a different opinion that children at this age are able to understand the motives of their behavior and recognize the intentions of others prevails, (Kerulienė & Užpurvytė, 2017). At the age of 3 children already have an ability to distinguish between conscious and unconscious actions, at the age of 3-4 they begin to develop emotional awareness, empathy and learn to follow rules. Five-year-old children may already have acquired an ability to distinguish an intentional action from an unintentional one, a sense of moral responsibility develops, which enables to distinguish good deeds from inappropriate ones (Kerulienė & Užpurvytė, 2017; Bulošė & Valaitienė, 2019). The results of the accomplished researches also reveal that the manifestation of bullying is already observed at preschool age (Lee, 2020; Zhong, Zhao, Ai, Zeng & Stone-MacDonald, 2022), a research conducted in Finnish preschools reveals that 12.6% of 3-6 years children in preschools were directly associated with the phenomenon of bullying (Kirves & Sajaniemi, 2012), after conducting a research in Swedish



pre-school educational institutions, it became clear that 6% of the researched participants were classified as being bullied, 10% as bullies and those who experience bullying, and 11% as bullies (Roseth & Pellegrini, 2018). Referring to the research results, it can be stated that the manifestation of bullying is already observed at preschool age.

Bullying among preschool children is more characterized by physical aggressiveness, and a little later, when children gain more linguistic experience, verbal and social forms of aggression appear (Skoglund, 2020; Ozsahin & Yayci, 2021; Klanienė et al., 2022). The forms of bullying are shown in Figure 1.



*Figure 1 Forms of bullying and their signs at preschool age (Ozsahin & Yayci, 2021)*

One of the most common forms of bullying among preschool children is social exclusion (e.g. exclusion from a game) (Skoglund, 2020; Enlebaas & Killen, 2016). Social exclusion is an integral part of social life in all periods of a person's life, includes various areas of life and an inability to participate in activities available to the majority of people in society. Social exclusion threatens the demand to belong, which is considered to be a central interpersonal motive predetermined by a wide range of human behaviors, emotions, and thoughts (Marinovic & Trauble, 2018). This affects not only the quality of life of individuals, but also the equality and cohesion of society as a whole (Crous & Bradshaw, 2017). Specifying the term of social exclusion, it can be defined as exclusion, dislike and avoidance of a person (Stenseng, Belsky, Skalicka & Wichstrom, 2015).

Social participation in group activities, the importance of friendship, and search for one's place in a group are extremely important tasks that arise at preschool age (Koyuturk Kocer & Gultekin Akduman, 2019; Hwang & Markson, 2020; Swit, Blakely-McClure & Kamper-DeMarco, 2023). A significant developmental step in the life of a preschool child is the first interaction with other peers - as soon as a child enters a preschool educational institution, he, separated from his family, enters a social environment consisting of his peers for the first time. In this social environment child's need to be with other children manifests

itself through group games (Koyuturk Kocer & Gultekin Akduman, 2019), therefore, groups among peers are immediately starting to be formed, where decisions whom to include and whom to exclude are being made (Hwang & Markson, 2020).

The researchers (Killen, Muvey & Hitti, 2013) identify two forms of social exclusion: interpersonal and intergroup rejection. Interpersonal rejection emerges from individual personality traits. Two types of interpersonal exclusion are distinguished - rejected children who are very shy, timid, anxious and vulnerable or rejected children who behave aggressively. The factors that lead to peer exclusion include temperament, insecure attachment, lack of friends, lack of self-confidence, and lack of social skills (Killen et al., 2013; Hwang & Markson, 2020). Intergroup exclusion is associated with differences in gender, race, ethnicity, culture, or nationality (Killen et al., 2013).

Preschoolers experience bullying primarily as exclusion from a game, which is what they fear the most when they are in a peer group. However, it is the most common form of social exclusion that most often occurs among preschool children, and observations reveal that in each preschool education group, one or two children are systematically (their behavior is directed against the same child) and intentionally rejected and removed from the game (Skoglund, 2020). In early childhood, a game is a way to explore the world and understand the relationships between one self and the people around, therefore, regarding the significance of games and knowing that the fear of not having someone to play with is clearly present, rejection during a game can be described as a preschooler's understanding of what bullying is (Helgeland & Lund, 2017).

Friendship status is very important in preschool children's relationships - it has been proven that children of this age are more likely to share their items and toys with children they consider their friends than with children they do not like (Cooley & Killen, 2015). It is observed that at preschool age, children already demonstrate socially exclusive behavior, for example, they intentionally remove another child from playing with a ball, loudly express their desire 'not to make friends', do not give their hand when they need to hold hands or play together (Hwang & Markson, 2020). Younger preschoolers find decisions about social exclusion more primitively, older preschoolers tend to reason social exclusion based on group loyalty or group intentions (Hwang & Markson, 2020).

It is important to note that the quality of early interpersonal relationships affects children's well-being and health in adulthood (Raitanen, Sandberg & Oksanen, 2017), research data reveals a positive relation between peer exclusion problems experienced in preschool and mental health and/or delinquency problems in adolescence and adulthood (Saracho, 2017). Social exclusion experienced at preschool age has a negative impact on the social, emotional and cognitive development of a child. This is associated with problems such as an increased risk of depression, suicide, anti-social behaviour, anxiety and low self-

esteem (Lund, Helgeland & Kovac, 2015). Experience of exclusion in the peer group leads to isolation and lack of motivation (Killen et al., 2013).

D. Olweus, S. P. Limber (2008) note that while assessing the phenomenon of bullying in general, it can be defined as a systemic problem of the entire educational institution. Therefore, when talking about social exclusion as an essential form of expression of bullying in pre-school education institutions, a systematic approach, research and the provision of effective preventive directions are crucial. As the above mentioned researcher states, the presumption of effective prevention is understanding of the manifestation of bullying, therefore, this article pays the greatest attention to the presentation of research on social exclusion as a manifestation of bullying.

### **Research methodology**

The research is based on D. Olweus (1993) theoretical provision that effective prevention is possible only after a complete understanding of the bullying phenomenon (causes, forms, roles of participants, etc.).

In order to reveal social rejection among peers in a preschool education group, two qualitative studies were conducted in March – April, 2022.

*Semi-structured interview.* The choice of the semi-structured interview method was determined because detailed, structured data is obtained by means of this method, while the interview itself remains informal and takes the form of a conversation (Bitinas, Rupšienė & Žydžiūnaitė, 2008). The following topics were highlighted in the interview: *demographic data, forms of social rejection as an expression of bullying; causes of social rejection as an expression of bullying; characteristics of the participants. The sample of informants was created by means of criterion selection.* 5 preschool teachers participated in the research, and they were selected according to the following criteria: having at least 1 year of experience and working with 2-5 year old children. In the research data informants' answers were marked by assigning the code X (X1, X2, etc.).

*Pedagogical observation.* The observation method was chosen due to its completeness in analyzing the behavior of the whole group, purposeful assessment of behavior, impartiality (the observation method does not depend on the attitudes of the informants, and it is possible to observe many characteristics and phenomena at the same time (Kardelis, 2016). The closer the researcher gets to the research participants, the better he can understand the object of research and provide more targeted data (Žydžiūnaitė & Sabaliauskas, 2017; Ciesielska, Ohlander & Bostrom, 2018), therefore, it was chosen to conduct pedagogical observation based on the participation criterion (when the researcher himself is a participant in the observational environment). The observation was applied in a preschool education group in order to obtain data about children's behavior, relationships, roles. During pedagogical observation the data was collected in

several stages: 1) an observation program was prepared (observation object, observation elements, a type of observation according to the position of the observer and the methods recording the collected information), 2) a direct organization of observation was carried out (the primary data was registered in the monitoring protocol, systematized, prepared for processing), 3) processing of the collected data, 4) data analysis (conclusions, proposals and practical recommendations were presented) (Kudinovienė, 2008).

The sample of the informants was made by convenience sampling criteria. Pedagogical observation was carried out in a preschool education group (2-5 years old) of the X educational institution, which was attended by 12 children. 6 boys and 6 girls participated in the research (2 years (1); 3-4 years (4); 5 years (7)). The duration of the research - 1 month. The answers of the research participants were marked by assigning a code (M-girls, B- boys).

Qualitative content analysis was used for data processing in both researches. By the method of qualitative content analysis it was trying to obtain repeated and reasonable insights from the given written text - collected information (Kardelis, 2016). The steps of qualitative content analysis are presented in the scientific literature: repeated reading of a text; identification of manifest categories based on keywords; division of category content into subcategories; interpretation and justification of categories and subcategories with evidence abstracted from the text (Žydzūnaitė & Sabaliauskas, 2017).

The research is based on the main ethical principles: volunteering and ensuring personal confidentiality (Gaižauskaitė & Valavičienė, 2016). The individual's freedom to agree or disagree to be a research participant was recognized and respected. A lot of attention was paid to ensuring the anonymity of the participants, the research data is coded without revealing information that violates the privacy of the research participants.

## Research results

Trying to reveal the signs of social exclusion as an expression of bullying, it was focused on three aspects: *forms of expression, intensity and location*.

The analysis of the interview data of preschool teachers revealed that social exclusion among peers as an expression of bullying is characterized by three forms, i.e. display of physical rejection, refusal to play and verbally expressed unwillingness to play together. The answers of the informants regarding the demonstration of physical rejection are illustrated by the following statements: '<...>it happens that they do not want to hold hands<...>' (X1); '<...>do not give a hand<...>' (X2); The responses of preschool teachers also reveal cases of refusal to accept to play: '<...>does not allow to play<...>' (X4); '<...>refuses somebody else to join to play<...>' (X5); '<...>if they dislike your friend, they do not accept you in a game<...>' (X1). Another prominent form is the verbally expressed

reluctance to make friends: '*<...> do not want to make friends, say that directly<...>*' (X2); '*<...> they respond to the child's attempts to join the activity 'we do not want to play with you, we will not be friends, get out of here'<...>*' (X4).

The analysis of teachers' answers shows that social exclusion of 2-5 years children among peers as a form of expression of bullying mainly manifests itself in game activities.

The results of the conducted pedagogical observation revealed similar tendencies. The most frequently identified form of exclusion from the game/refusal to play together, which occurred 3 times, in the first case: '*B5 (4 years old) wanted to join B1 (5 years old) in a game (B1 played together with B4 (5 years old) and B3 (5 years old). B1 was building a lego city with other boys and was playing with cars in it, when B5 tried to play together, B1 said loudly 'you will not play with us'; in the following situation: 'B1 (5 years old) did not accept to play M3 (5 years old .)'; in the third case: 'M3 wanted to join in and play with M1. When M3 approached, M1 said 'I don't want to play anymore', left the dolls to M3 and went to the other children. M3 took the dolls and started playing alone.'*

A form of social exclusion as a form of an expression of bullying was less frequently observed, 2 times - by displaying physical rejection: '*M1 (5 years old) did not want to give a hand to M2 (5 years old) during music class on Wednesday'; ,M1 (age 5) did not want to give a hand to M2 (age 5) during music class on Thursday.*' During the observation, it became clear that the demonstration of physical rejection took place systematically, the situation was constantly repeating with the same participants. This can be treated as a bullying situation, since a repetitive aspect is observed.

The least common form, recorded once - an imbalance of children's physical abilities, the expression of which can be seen in the following situation: '*B1 (5 years old) is a year older than B5 (4 years old), due to the age difference the boys do not want to play together, B1 has difficulty in understanding B5's statements while playing'* and reluctance to make friends is expressed verbally: '*M3 (5 years old) wanted to join a group of children: B1 (5 years old), M1 (5 years old), B3 (5 years old) and B4 (5 years old), playing with a doll house . When M3 tried to join, B1 told the children "do not make friends with her'*. It can be observed that even in several different situations the same research participants B1, M1, M3 took part. B1 and M1 initiated 2 situations each. M3 experienced social rejection as a form of expression of bullying in 2 situations. In these situations an essential element of bullying became apparent – *repetition/repeatability*.

The analysis of the research results made it possible to highlight the signs of the intensity of social exclusion as a form of expression of bullying. According to the preschool teachers, who participated in the research, the intensity of cases of social exclusion as a form of expression of bullying varies. 2 informants stated

that they see situations of social exclusion as a manifestation of bullying once a week: ‘<...>not very often, there are rare cases<...>, one case occurs once a week<...>’ (X2); another informant expressed a similar opinion, stating that ‘<...>at least once a week such a situation happens to one or other children<...>’ (X4). 2 informants stated that they notice these situations 2-3 times a week: ‘<...>let’s say, 2-3 times a week<...>’ (X1); ‘<...>often, although not daily, but several times a week<...>’ (X3). 1 informant indicated that situations of social exclusion as a manifestation of bullying are rarely observed (‘<...>bullying in a preschool institution is a rare phenomenon<...>’ (X5).

After the pedagogical observation among 2-5 age group of children, it was observed that social exclusion as a form of bullying is also repeated differently - once per day (B5 and B1); twice a day (M3 and B1); twice a week (M1 and M2; M1 and M3).

Thus, in preschool age, the beginning of bullying is observed, as children express physical and verbal aggression towards their peers constantly, these actions tend to be repeated towards the same children, which reflects one criterion of bullying - repetition.

Teachers were asked in which activities the cases of social exclusion as the cases of expression of bullying are most often observed, and the analysis of data allowed to highlight 3 activities. The first activity emphasized by informants - musical activities: ‘<...>when you have to go dance in a circle<...>’ (X1); ‘<...>in musical activity<...>’ (X3); ‘<...>’. The second activity indicated by the informants - is group games: ‘<...>most often it happens during group games when you do not want to play together<...>’ (X1); ‘<...>when playing, it sets some apart<...>’ (X2). Another prominent activity is outdoor walks: ‘<...>when we go for a walk, then he does not want to hold hands with some children, he goes to others <...>’ (X1); ‘<...>probably most during outings, when everyone has to go in pairs holding hands<...>’ (X4); ‘<...>it is often outside when they do not want to give a hand to someone while walking<...>’ (X5). Similar tendencies are also revealed by the observational data, it turned out that situations of social exclusion as a form of expression of bullying are mostly observed in group game activities, sometimes in musical activities, and rarely in outdoor game activities. So, it can be said that social exclusion as a form of expression of bullying manifests itself in various activities of a preschool education group.

In order to better understand the context of social exclusion as a form of expression of bullying, we were interested in the characteristics of children involved in bullying situations, i.e. bullies and those who initiate bullying.

When examining the statements of preschool teachers about the characteristics of preschool children who experienced social exclusion as a manifestation of bullying in the situations they saw, the following aspects emerged: *closedness, sensitivity, special educational needs, self-assurance.*

The informants mentioned that in most cases closed children experience social exclusion: ‘<...>closed children<...>’ (X1); ‘<...>are calmer, more closed<...>’ (X3). Another characteristic is sensitivity: (‘<...>showing emotions clearly, e.g. if they cry a lot<...>’ (X1); ‘<...>more sensitive children are rejected<...>’ (X4). One more characteristic mentioned by the informants is special educational needs ‘<...>children with atypical development<...>’ (X3); ‘<...>with mental, physical illnesses<...>’ (X5). The informants attributed a high level of self-confidence to the latter characteristics: ‘<...> always willing to be the best in games, etc. <...>’ (X4); *most of all, others do not like arrogant children with big egos, who ‘raise’ themselves, e.g. ‘give it to me’, ‘I will win’, etc. <...>’* (X2). These data highlight the experience of interpersonal exclusion, it can be seen that it is not uncommon for children to experience social exclusion due to certain personal characteristics.

While analyzing the characteristics identified by preschool teachers, which were common to preschool children, who initiated social exclusion as an expression of bullying in the situations they saw, the following characteristics emerged: *dominance, excessive mobility*. The informants emphasized the characteristic of dominance: ‘<...>commanding, who want to dominate in games<...>’ (X1); ‘<...>rejects probably the most dominant ones, who command others in a group, although it happens that others also reject<...>’ (X2). *In each group of children, one or more leaders stand out, guiding other children in a group<...>’* (X4). Another characteristic highlighted by the research participants is excessive mobility: ‘<...>very active children’ (X3); ‘<...>children who are very active, do not freeze in place<...>’ (X5). Preschool teachers also highlighted the age factor as a characteristic of children who initiate social rejection: ‘<...>I have noticed that rejection is already visible among older 4-5 years old children, <...>’ (X1); ‘<...>I would say that the older ones really tend to reject somebody more often than the little ones. They already tend to exclude some children<...>’ (X2). These data are also supplemented by observation results, which revealed that older children – i.e. five-year-olds - are more likely to initiate cases of social exclusion, which indicates that the beginning of bullying is formed at this age, as the criterion, common to bullying - a power imbalance - appears.

Pedagogical observation data revealed that the initiators of social exclusion as a form of expression of bullying were representatives of both sexes. The results did not reveal significant gender differences, although there is research suggesting that forms of social exclusion are more typical for girls (Douvlos, 2019).

## **Conclusions and discussion**

Bullying at preschool age often manifests itself as an indirect form of bullying – social exclusion. A preschool institution is an important place for socialization, the first separation from a family is experienced and new

relationships are formed, therefore, an interaction of social relations with peers becomes an important criterion for understanding one's status, abilities and place in the group. Experiences of social exclusion in early childhood can have a negative impact on social development, future relationships, and a child's emotional well-being (Douvlos, 2019; Skoglund, 2020; Ozsahin & Yayci, 2021).

I. Tanrikulu (2020) emphasizes that the main method children use to communicate at preschool age is a game, so the most painful experience for preschool children is being excluded from it. The results of the research reveal that social exclusion of preschool children by their peers is noticeable and usually occurs by removing another child from a game, by demonstrating rejection physically, and expressing reluctance to make friends verbally. It is observed that most often the cases of social exclusion are recorded during group games activities, music sessions or group activities in the field. These aspects are also reflected in the findings of other researchers that one of the most common forms of social exclusion at preschool age is exclusion from a game or not being admitted to play together (Kirves & Sajaniemi, 2012; Skoglund, 2020; Swit et al., 2023).

M. Killen et al., (2013) distinguish two types of social exclusion: interpersonal (due to individual personality traits) and intergroup (due to differences in gender, race, origin, culture, etc.). The research revealed that children experience social exclusion due to special educational needs or personality characteristics (high self-confidence, aggressiveness, closedness, sensitivity). It has been observed that the cases of social exclusion arise due to interpersonal factors.

The research data responds to the claims of other researchers that one of the main reasons for social exclusion in a group is that they show behavior that is unacceptable to their peers (Hwang & Markson, 2020). The research results of other authors (Wolke & Lereya, 2015; Davis & Gere, 2018; Douvlos, 2019) emphasize that social exclusion as a form of expression of bullying is experienced by children who tend to behave aggressively, are uncommunitave, socially withdrawn, and particularly sensitive. It is also noted that children with special educational needs often repeatedly experience situations of social exclusion (Skoglund, 2020).

Situations of social exclusion are initiated by children who are 4-5 years old and have excessive mobility level and dominance. The research revealed that older children that are 4- 5 years tend to initiate cases of social exclusion, which shows that the beginning of bullying is formed at this age, because a criterion typical for bullying - an imbalance of power - appears. The results did not reveal significant gender differences, although there are researches suggesting that the forms of social exclusion are more typical for girls (Douvlos, 2019).

Three criteria are necessary for the identification of social exclusion as a form of expression of bullying: repeatability, intentional desire to hurt and power



imbalance (Olweus, 1993; Kirves & Sajaniemi, 2012; Hwang & Markson, 2020). The results of the research enabled to highlight two essential bullying criteria of common to social exclusion among peers: repeatability and power imbalance, which allow to identify social exclusion as one of the forms of expression of bullying. The third criterion - an intentional desire to hurt, was not revealed in the research, so, a continuation of the research on this topic and wider discussions among scientists are necessary.

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# TECHNOLOGICAL PRINCIPLES OF SOCIAL PROJECTING IN THE CIVIL SOCIETY ORGANIZATIONS' ACTIVITIES IN UKRAINE

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**Abstract:** *The ongoing war in Ukraine has exacerbated social vulnerabilities, prompting civil society organizations to adopt innovative strategies. This article explores the use of social projecting as a framework to guide project-based interventions supporting vulnerable populations. The aim is to define the technological foundations of social projecting within the context of Ukrainian civil society organizations, encompassing relevant content, forms, and methods of social work.*

*The study employs methods of analysis, synthesis, and systematization of scientific sources to establish key concepts. Comparative analysis identifies the unique features of social projecting, while legal frameworks are examined to determine the basis for social planning within civil society organizations. Guided by problem-oriented and heuristic approaches, the research analyses and synthesizes existing definitions of "project" and project classification systems.*

*Key findings interpret "projecting" as a process of project creation and implementation, specifically within a social context. Social projecting is defined as a combined theoretical and practical activity aimed at developing projects for social systems, institutions, and objects. These projects rely on social prediction, forecasting, and planning to anticipate and optimize the social impact of interventions.*

*By implementing a robust social projecting framework, civil society organizations in Ukraine can strengthen their project-based interventions, ultimately enhancing the effectiveness of social support initiatives for vulnerable populations during wartime and beyond.*

*In the course of the study, the features of the social projecting process were determined: the contradiction of the social state; multi-vector development of a social object; multiplicity of factors of its being; subjective components of the formation of social expectation and forecast; factors determining various criteria for assessing social status. It is substantiated that the technologies of social projecting are determined by the environment of their implementation, orientation towards a certain group of recipients of social services, types of activities of specialists, features of the social institution. It has been established that four approaches should be taken into account in the development of social projecting technologies: environmental, institutional, person-oriented and activity-based, and their characteristics are provided.*

*The technological foundations of social projecting are defined as a set of content, forms and methods of social work aimed at optimizing social work with different categories of recipients of social services based on social prediction, forecasting and planning of their social qualities*

*and properties. By implementing a robust social projecting framework, Ukrainian CSOs can strengthen their project-based interventions, ultimately enhancing the effectiveness of social support initiatives for vulnerable populations during the current conflict and beyond.*

**Keywords:** *civil society organizations, non-governmental organizations (NGO), project, projecting, project activity, social projecting, technological principles, technologies of social work.*

## **Introduction**

Ukraine's contemporary social policy reflects a dynamic interplay of factors. These include socio-economic transformations within Ukrainian society, political and legislative efforts towards European integration and aligning with international norms, the expanding role of the non-state sector in regulating key social relations, and a shift in public perception regarding the significance of civil society organizations (CSOs) and their initiatives. The implementation of social work in Ukraine currently takes place in the conditions of the social crisis of wartime, which determines the need to find new, in particular, project-based forms of activity of civil society organizations for social support of vulnerable categories of the population. The ongoing war in Ukraine has significantly exacerbated existing social vulnerabilities, necessitating the exploration of innovative social work approaches. This study focuses on project-based interventions implemented by civil society organizations (CSOs) as a means to deliver crucial social support to vulnerable populations disproportionately affected by the war.

This research aligns with the legal framework of Ukraine, as outlined in the following laws: The Law of Ukraine "On Ensuring the Rights and Freedoms of Citizens and the Legal Regime in the Temporarily Occupied Territory of Ukraine" (Verhovna Rada of Ukraine, 2014) which addresses ensuring state sovereignty in occupied territories; the Law of Ukraine "On Social Services" (Verhovna Rada of Ukraine, 2019) which establishes principles for providing social services to those in difficult circumstances; the Law of Ukraine "On Public Associations" (Verhovna Rada of Ukraine, 2012) which defines the legal framework for the formation and operation of public associations.

The number of registered civil society organizations (CSOs) in Ukraine serves as an indicator of the development and vibrancy of its civil society. As of December 2021, the country had 96,258 registered CSOs, reflecting a 25% increase compared to 2013 (77,065) (CS.DETECTOR.MEDIA, 2023). This growth underscores the growing role of CSOs in Ukrainian society.

However, the full-scale invasion of Russia in 2022 significantly impacted the landscape of CSOs in Ukraine. While the number of newly formed general CSOs decreased, there was a dramatic surge in the creation of new charities. This shift reflects the urgent need for humanitarian and social support during wartime. Media data further supports this observation, with mentions of charitable

organizations, foundations, volunteer organizations, and CSOs in Ukrainian media increasing nearly tenfold between February and November 2022 (CS.DETECTOR.MEDIA, 2023).

This transition in the types of CSOs emerging highlights the adaptability and vital role these organizations play in responding to evolving societal needs. Analysing the technological foundations of social projecting within Ukrainian CSOs becomes even more relevant in this context. Understanding and optimizing these foundations can significantly enhance the effectiveness of CSOs in conducting impactful social projects, ultimately contributing to the well-being of vulnerable populations during challenging times.

### **Literature Review**

Several scholars have addressed various aspects of the theory and practice of social work and the application of project-based approaches within CSOs for social support of vulnerable groups of the population.

Thus, Honchar et al. (2020) emphasize the project as a strategic tool for realizing organizational missions, while Denysiuk et al. (2023) highlight the importance of project activities in social work with vulnerable groups.

Current research increasingly emphasizes project-based initiatives at various societal levels (Bezpalko, 2010). Shved (2023) defines social projects as actions targeted at specific social groups or communities, aiming to solve particular social problems and improve their overall well-being.

Existing scholarship has explored various aspects of project implementation, including monitoring and evaluation (Yaremenko et al., 2002), management tools (Verga Matos et al., 2019), and the logical framework in international development projects (Golini et al., 2018).

Monitoring and evaluation are crucial for assessing project effectiveness within social work, as highlighted by Shinkaruk et al. (2022). They define projects as interventions with defined goals, limited timeframes, and specific resource allocation. Similarly, Amin et al. (2023) advocate for stakeholder engagement in monitoring and evaluation within international development projects, fostering stronger stakeholder relationships and ensuring community impact.

Morris & Geraldi (2011) highlight the importance of leadership in creating supportive environments for project success, both internally within an organization and externally within the community. Additionally, Turner et al. (2010) emphasize the vast array of methods, techniques, and skills available in modern project management.

Project activities offer significant benefits: applying knowledge from various disciplines, addressing critical social issues, and generating theoretical, practical, and cognitive value (Mykhailichenko & Rudyk, 2016). Moreover, Morze et al.

(2017) emphasize the potential for scientific cooperation and project management using ICT tools.

In line with these scholars, we advocate for investigating the technological foundations of social projecting within Ukrainian CSOs. This includes identifying appropriate content, forms, and methods of social work to optimize their ability to support vulnerable populations.

## **Methodology**

**Research Objective:** the study aimed to establish the technological foundations of social projecting within the activities of Ukrainian civil society organizations (CSOs). It sought to identify the relevant content, forms, and methods utilized in social work practices within CSOs.

**Methods:** to achieve our research goals, we employed a multi-pronged methodological approach:

**Literature Review:** we conducted a thorough analysis of 18 scientific publications and relevant Ukrainian legislation. This analysis focused on various aspects of social projecting in CSOs, as well as pertinent legal frameworks. The reviewed legislation included the Ukrainian laws: "On Public Associations" (Verhovna Rada of Ukraine, 2012), "On Ensuring the Rights and Freedoms of Citizens and the Legal Regime in the Temporarily Occupied Territory of Ukraine" (Verhovna Rada of Ukraine, 2014), and "On Social Services" (Verhovna Rada of Ukraine, 2019). This legal review ensured our research adhered to the current legal context of Ukraine.

**Theoretical Framework:** our research drew upon two key theoretical approaches: problem-based and heuristic frameworks. The problem-based approach acknowledges the centrality of problem situations in the design of social interventions. It emphasizes the importance of community and stakeholder involvement in addressing social issues. The heuristic approach highlights the application of project tools for creative problem-solving and facilitating successful social service recipient socialization. Additionally, the person-centered approach informed our focus on individual self-worth, self-actualization, and uniqueness.

**Analytical Method:** while the research question centered on the development of a theoretical framework, we did not utilize formal empirical data analysis. Instead, we employed an intuitive-logical analysis to examine the existing literature and legal documents. To ensure the validity of our interpretations, we engaged in theoretical triangulation by incorporating diverse perspectives on the interpretation of relevant data.

**Limitations:** the article acknowledges the limitation of not employing formal empirical data analysis. Future studies could benefit from incorporating

quantitative or qualitative data collection and analysis to further enhance the understanding of social projecting practices in Ukrainian CSOs.

## **Research Results**

We assumed that in modern scientific research in the field of social work, the issues of developing the content, forms and methods of the project activities of civil society organizations remain insufficiently resolved; development of an algorithm for implementing projects of civil society organizations for social support of various categories of recipients of social services. Therefore, we faced the task of analysing scientific approaches to defining the concepts of "project", "projecting", "social project", and "project activity".

The concept of "project" found scientific, theoretical and technological justification at the beginning of the 20th century, translated from Latin (*projectus*) means "thrown forward".

Encyclopaedic sources interpret the concept of "project" as a set of coordinated actions with certain reference and completion zones to achieve goals with established deadlines, costs, and performance parameters (Zvereva, 2008); as an idea, planning system, concept, activity to create a prototype, prototype of the intended object (Kremen, 2021).

There are many approaches to grouping projects according to various characteristics. That is why the exact definition may depend on the purpose of the project (engineering, design-project, management). The following projects are defined as the type of document: technical, graphic, sketch, working, etc. According to the nature of the planned changes, the projects are divided into innovative, construction and traditional. According to the features of financing, investment, sponsorship, budget, charity projects are distinguished. According to the global impact, such projects can be defined as macro-projects, small-scale projects, or mega-projects. The scale of changes allows us to name the following types of projects: national, interregional, regional, local. Also, the basis for grouping projects is the duration of actions, so short-term, medium-term, and long-term are defined.

Nowadays, along with classic projects (technical, engineering, architectural and construction), project technologies have been developed in other areas, in particular in education, sociology, and social work. Therefore, the following types of projects can be defined by the field of activity: social, pedagogical, cultural, economic, technical, financial, mixed, etc.

A project is an imaginary construction of certain changes, which is pre-planned and can be implemented later in real life. The project provides an opportunity to move from ideas to action, structuring the stages of this process in a certain way and has several characteristic features. First, it always has a goal, because clearly defined goals are the key to obtaining specific results. Projects are



always limited in time and space because they always have a beginning and an end. The project is implemented in a certain place (institutions, social institutions, communities, etc.) and context.

It is known that each project has its life cycle - the period of time from the moment of the project's appearance to its final implementation (Figure 1). It reflects the development of the project, the work carried out at various stages of preparation, implementation and operation of the project. The life cycle is a certain scheme or algorithm, with the help of which the sequence of actions is established during the development and implementation of the project. The degree of detail and the terminology of the description of the relevant procedures depend on the nature of the project, the subject culture, the tasks set, the available resources, and partly the preferences and tastes of the project developers.



*Figure 1 Life cycle of the project (made by authors)*

The life cycle of a project begins, actually, with the need for it. That is, there is some problem, or there are no necessary conditions for the comfortable existence of a group of people. That is, there are obstacles in development, or there are no certain conditions for development. If a person (or a group of people) decides to get rid of these obstacles (or create these conditions), then he, first of all, determines what exactly he wants to achieve (improve), that is, he sets a certain goal for himself (Honchar et al., 2020).

There are four phases of the project, which alternate successively throughout its life cycle: project concept (formation of the idea (idea), setting of tasks); project development and preparation; project implementation; and the end of the project. Each of the phases is characterized by a set of more or less stable elements and a certain implementation technology.

Project management in a public organization involves the management of a project; the content of the project; terms; the budget; human resources; communications; risks. Each of the components requires improvement of the competencies of both the manager and team members and the development of corporate culture in the organization. In general, the application of the project approach will be able to increase the organizational capacity of the public sector (Honchar et al., 2020).

Each project has a corresponding text design, which mostly reflects: the problem, the solution of which the project is aimed; the purpose and tasks of the project; a description of the types of activities that are planned to be performed within the scope of the project; terms and place of project implementation; predicted results; personnel, financial and logistical support of the project; cost estimate. The text description of the project is a form of recording the intended ideas of the developers and a working document during the implementation of the project. When the project has the form of a certain text document and the available resources for its implementation, the stage of direct implementation of the project comes, when not only the planned activities are carried out, but also monitoring is carried out - constant tracking of the progress of the work carried out within the project to compare the actual state of affairs with the plan.

The project can exist in two varieties: as an integral part of the wider economic and social development program, which defines the main goals and tasks that belong to the social sphere and must be fulfilled in the planned period, as well as the main means and ways of their implementation; as an independent solution to the local problem of a specific target group in a certain environment (Bezpalko, 2010: 7). To optimize and improve measures designed to maximize the probability of project success, it is important to have an effective monitoring and evaluation system that will help to recognize promising measures at the early stages to be able to implement them in other places.

In the scientific literature, projecting is considered as an activity to create and implement a project, that is, as a method that was used in both technical and social fields of human activity; as the ability to plan, outline a plan of action, construct, plan and implement a plan, intention (Yaremenko et al., 2002). In the theory of social work, projecting is considered as the definition of versions or variants of the development or change of a certain phenomenon or object; construction of variants of the optimal future state of the object; a form of anticipatory reflection and transformation of reality, aimed at constructing a system of parameters of the future material object or its qualitatively new state; decision-making in conditions of uncertainty (Bezpalko, 2010: 5). Terms close to projecting are also used (modelling, construction, forecasting). In particular, constructing is considered the ability to develop a certain design of an object or system, which is then materialized in the planning of the teacher's activities by the given goals and objectives. Modelling is understood as the study of certain

phenomena, processes or systems by building and studying their substitute models, analogs of the object under study. The researcher interprets forecasting as the ability to make scientific predictions, a special study of the prospects of a certain phenomenon by comparing goals with real, concrete conditions and ways of achieving them in the past and now. Also close is the understanding of planning as an idealized representation of future activity (Pehota et al., 2001). We believe that projecting is a more general concept, and the projecting process cannot be reduced to planning only. According to the project ontology, the project defines a complete object, and describes its structure and functioning. Instead, the plan specifies only the state of the planned object and recommendations for the use of one or another means of transition from one state to another.

The project is always implemented in certain spaces and environments: territorial, temporal and social. That is why the project as a result of creative collective activity contributes to changes in the social environment. Therefore, the next task of our theoretical analysis was to define approaches to the concept of "social project".

In scientific literature, a social project is interpreted as a constructed social innovation, the purpose of which is to create, modernize, or maintain in an environment material or spiritual value, which has space-time and resource limitations and whose impact on people is positive in terms of its social significance (Zvereva, 2012); the social projecting is defined as a scientific-theoretical and at the same time practical activity for creating projects for the development of social systems, institutions, objects based on social prediction, forecasting and planning of their social qualities and properties (Bezpalko, 2010). This provides opportunities to manage social processes and is an expression of the new, which characterizes the trends of social development. That is why social projecting is related to innovative activities and the implementation of social innovations. To ensure the creation and implementation of a social project, it is necessary to perform a certain set of actions: informational, analytical, organizational, legal, financial, personnel, material and technical, expert, forecasting, etc.

Depending on the field of implementation and the category of service recipients, a social project acquires certain features. Scientists single out the socio-pedagogical project as a constructed social innovation, the purpose of which is to improve pedagogical processes (development, education, upbringing, social formation of personality) in certain socio-cultural conditions. Unlike social projects, which are aimed at the transformation and improvement of society, social relations and processes, the socio-pedagogical project is aimed at solving the tasks of education and upbringing. Objects of socio-pedagogical design: socio-cultural environment (creation of a favourable socio-cultural space and optimization of conditions for self-development of the individual, social group, territory in general); lifestyle (support of certain types and areas of personal

activity that contribute to the growth of quality indicators of life); spheres of an individual's life (educational, leisure, educational, industrial, sports, informational, etc.). Socio-pedagogical projects can be aimed at creating conditions for the development of the sociality of the subject (individual, group); self-realization of the individual in the main areas of his life; ensuring favourable conditions for the socialization of the individual in various spheres of the social environment; solution or minimization of unfavourable conditions of socialization of the individual (Bezpalko, 2010).

If we consider the process of social design as a prediction of ways of development of social objects, qualities and characteristics, then the following parameters can be laid down in the basis of social design: contradiction of a social object; multi-vector development of a social object; multiplicity of factors of its being; subjective components of the formation of social expectation and forecast; factors determining various criteria for evaluating a social object, etc.

One of the priority tasks of social work of civil society organizations is the development of modern technologies of social projecting. We detail the content of the concepts of "technological principles" and "social projecting technologies".

Technologies of social work act as an intellectual resource to a large extent, the use of which allows you to actively influence the process of social development of society, to obtain a predicted social result. That is why the effective formation of the social policy of Ukraine is possible only based on the technologization of social processes, due to the optimal use of social resources and the capabilities of social institutions, in particular, the resources of project activities.

All technologies known today are divided into two groups: industrial and social. Social is defined as a technology in which the initial and final result is a person, and the main parameters of measurement are its qualities and properties (Zvereva, 2012).

Understanding social work as an integrated, universal type of activity aimed at satisfying the socially guaranteed and personal interests and needs of people, first of all, socially vulnerable strata of the population, allows defining two types of social technologies: social programs containing certain means and methods of activity; the activity itself, built according to such programs. As for the second type, the term technology of social work (activity) is more often used here.

Social work technologies are considered an algorithmized set of content, forms, methods, and techniques used by social institutions and social workers to solve social work tasks (Denysiuk et al, 2023). Depending on the type, content and priority practices of social work, the following basic technologies of social work are determined: social expertise; social control, social prevention, social correction, social rehabilitation, social therapy, social legal protection, social support, etc. In our opinion, social engineering technologies have recently occupied a prominent place in this list. Technologies of social projecting are

complex and integrate all existing technological approaches in an end-to-end manner.

## **Conclusions and Recommendations**

We found that social projecting technologies are determined by the environment of their implementation, orientation towards a certain group of recipients of social services, and types of activities of specialists. In addition, the specifics of social projecting are determined by a specific social institution (institution, agency, organization, etc.). Accordingly, four approaches should be taken into account in the development of social projecting technologies: environmental, institutional, person-oriented and activity-based.

The environmental approach involves the definition of social projecting technologies depending on the environment of their implementation. Accordingly, we can define the following groups of technologies: technologies of social projecting in the community, technologies of social projecting in the environment of a big city; technologies of social projecting in the socio-cultural environment, technologies of social projecting in the educational environment, etc.

The institutional approach allows to determine of social projecting technologies according to institutions, institutions/facilities providing social services (inpatient, rehabilitation, temporary stay). The technologies of this group include technologies of social projecting in social services; technologies of social projecting in the field of health care; technologies of social projecting in educational institutions; technologies of social projecting in institutions of the penitentiary system; technologies of social projecting in rehabilitation centers; technologies of social projecting in employment centers; technologies of social work at enterprises, institutions; technologies of social desi projecting in organizations of the non-state sector, etc. We deliberately choose those social institutions, the social projecting technologies of which are aimed at ensuring social functioning. To fulfil the tasks of our research, the priority group of institutions is civil society organizations.

A person-oriented approach involves directing social projecting technology to improve the social condition of a certain group of recipients of social services and to each person separately, taking into account their personal needs and requests. The main group of such technologies is social projecting in work with families: with families in difficult life circumstances; with families of military personnel; with families of internally displaced persons; with foster families; with young families; with antisocial families, etc. Technologies of social projecting in social work with children and youth include the following types of work: with gifted children and youth; with deviants; with persons with physical and intellectual limitations, etc. Among the priority modern types of personally-

oriented technologies of social projecting are the technologies of social projecting in work with military personnel; volunteers; persons who suffered damage caused by fire, natural disaster, catastrophe, hostilities, terrorist acts, armed conflict, temporary occupation; persons with disabilities; terminally ill; unemployed; persons without a fixed place of residence; the poor; persons who have lost social ties (convicts); victims of violence, etc.

The active approach is the most represented in the characteristics of the types of technologies of social projecting. Its essence is the determination of the process of social projecting by the content of the social worker's professional activity and leading professional tasks. Such technologies are the projecting of technologies: social diagnosis, social prevention, social therapy, social correction, social rehabilitation, social and legal protection, mediation, support, case management, representation of interests, consulting, etc.

The technological foundations of social projecting are defined by us as a set of content, forms and methods of social work aimed at optimizing social work with different categories of recipients of social services based on social prediction, forecasting, and planning of their social qualities and properties.

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# **BURNOUT SYNDROME IN SLOVAK TEACHERS IN RELATION TO SELECTED VARIABLES OF THE JOB DEMAND RESOURCES MODEL**

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**Abstract.** *The aim of this paper is to explore and analyse the prevalence of risk factors (and factors) associated with burnout among Slovak teachers. The research sample consists of 274 respondents: teachers, school principals, and other pedagogical staff. We used the Job Demand Resources Model (JD-R model), which suggests that the interplay between job demands and resources determines the overall impact on employee well-being. Jobs with high demands and low resources are likely to lead to burnout and health issues, while jobs with high demands but sufficient resources can lead to positive outcomes such as increased motivation and job satisfaction. Investigating burnout in teachers is essential for promoting the well-being of educators, maintaining a high-quality education system, and ensuring positive outcomes for both teachers and learners. Based on the Job Demand Resources Model, this study aims to analyse the relationship between selected variables and burnout syndrome among Slovak teachers.*

**Keywords:** *Burnout, Job Demand Resources Model, Risk Factors, Teachers, Well-being*

## **Introduction**

Educators and also teacher at higher education institutions have become more concerned about burnout syndrome in recent years. (Naidoo-Chetty & Plessis, 2021). This can be attributed to a variety of factors, including high job demands, limited job resources, and the impact of external variables such as student/pupil performance. Teacher burnout is a critical issue affecting the well-being of educators, with implications for both the teachers themselves and their students/pupils. Stress, anxiety, and depression are linked to higher levels of teacher burnout. Several studies (Bakker et al., 2004, Huang et al., 2015) have investigated the relationship between burnout and various factors, employing the Job Demands-Resources model as a theoretical framework. The demands placed on teachers, such as expanding class sizes and increased workload, have been identified as key contributors to burnout (Hakanen et al., 2006). According to the



Job Demands-Resources model, job resources play a crucial role in preventing the health-impairment process and promoting employee well-being (Hakanen et al., 2006). These resources include support from their colleagues and supervisors, opportunities for professional development, autonomy in decision-making, and a positive work environment (Nahrgang et al., 2011). The aim of this paper is to explore and analyse the prevalence of risk factors (and factors) associated with burnout among Slovak teachers.

### **Burnout Syndrome in Slovak Teachers**

Burnout syndrome among Slovak teachers is a significant issue that needs to be addressed. Teachers are overworked, suffer from the low social status of the profession, and lack the help of professionals such as teaching assistants, social educators, school psychologists and special educators in schools. These factors contribute to high job demands and limited job resources, which increase the risk of burnout among Slovak teachers.

In the Slovak research (Žitniaková Gurgová & Behúňová, 2017), teachers most often consider the presence of a pupil with special needs, frequent legislative changes, and the social evaluation of their work to be extremely stressful in their work. Teachers describe their further education, salary conditions, holding multiple positions or working overtime as very stressful. Teachers considered the following to be common manifestations of stress physical exhaustion, mental exhaustion, susceptibility to illness, pain headaches and internal tension. Thus, symptoms that may indicate an increased risk of burnout syndrome. 36% of teachers show a critical level of burnout (Žitniaková Gurgová & Behúňová, 2017).

In research on burnout syndrome of Slovak grammar schoolteachers (Hennelová & Preisingerová, 2012), the negative relationship between emotional exhaustion and reduced personal satisfaction was confirmed. As emotional exhaustion increased, teachers' personal satisfaction decreased. In the thematic area of gender differences, the hypothesis of a higher level of depersonalization scores for males compared to females was confirmed.

Reducing stress and burnout in teachers has been shown to have positive effects on their well-being, commitment to their work, and level of distress. (Carroll et al., 2021). Additionally, teacher well-being has been linked to student outcomes, highlighting the importance of addressing burnout not only for teachers' sake but also for the benefit of their students (Ross et al., 2011). Teacher self-efficacy has been found to be a predictor of psychological well-being, highlighting the importance of empowering teachers and building their confidence in their professional roles (Cansoy et al., 2020).

## **Methodology**

The main objective of the pilot quantitative study is to identify and analyse the prevalence of risk factors associated with burnout syndrome among Slovak teachers. The partial research objectives are:

- Determine the extent of job requirements and resources of the respondents.
- Determine the extent of burnout syndrome among the respondents.
- Analyse the relationship between job requirements and resources and the burnout syndrome among the respondents.

The main research tool used was an electronic questionnaire consisting of three parts. In the first part, respondents provided basic sociodemographic characteristics, including gender, age, highest education attained, current job position, and length of experience. The second part of the questionnaire consisted of the Work-related version of the Burnout Assessment Tool (BAT) (Schaufeli, Witte & Desart, 2020), mapping core symptoms (exhaustion, mental distance, cognitive impairment, emotional impairment) and secondary symptoms (psychological complaints, psychosomatic complaints). The third part was based on the Job Demand Resources (JDR) concept (Bakker & Demerouti, 2017), focusing on nine areas – work overload, emotional, mental and physical demands, role conflict, harassment, role clarity, team spirit, bureaucracy, personal conflict, and reciprocity. The individual variables of both BAT and JDR were scaled on a 5-point Likert scale (1 = never, 2 = rarely, 3 = sometimes, 4 = often, 5 = always).

The research sample consisted of 266 respondents (n=226 females, n=40 males) aged 24 to 66 years (M=43), with the most numerous group being respondents aged 40 to 49 years (n=117).

The largest part of the research sample consisted of respondents in the position of teacher (n=225), the remaining part consisted of respondents in the position of teacher's assistant and tutor (n=21), psychologist and special educator (n=9) and technical and economic workers (n=6). More than half of the respondents (60.9%) also hold a managerial position in their job.

## **Research results**

The results of the research are presented in the context of the main objective and partial objectives mentioned above.

### **• Job Demands and Resources of Teachers**

Table 1 documents the state of job demands and resources of our respondents. For their assessment, we used the JDR questionnaire, focusing on 9 selected areas, namely work overload, emotional, mental, and physical demands, role conflict, harassment, role clarity, team spirit, bureaucracy, personal conflict,

and reciprocity. In each area, respondents could provide their response on a Likert scale ranging from 1 (never) to 5 (always). In analysing the obtained research data, we employed one-dimensional descriptive methods, and the results are presented in the following frequency table:

Table 1 *Descriptive Statistics JDR (made by authors)*

	n	Mean		Std. Deviation
		Statistic	Std. Error	
work overload	265	3,378	,0488	,7949
emotional mental-physical demands	265	3,309	,0376	,6126
role conflict	265	2,574	,0533	,8674
role clarity	265	4,429	,0503	,8194
harrassment	264	1,104	,0169	,2752
personal conflict	264	1,64	,052	,843
team spirit	265	4,113	,0527	,8586
red tape (bureaucracy)	264	3,0196	,05798	,94199
reciprocity	265	2,98	,078	1,267

The above table shows that respondents in the work overload domain on average reported that they experience work overload "sometimes" (M=3.378; SD=.7949). The responses to the specific questions in this area showed that 40.91% of the respondents often have too much work to do and also that 45.28% of the respondents often have to do multiple tasks at the same time.

The qualitative requirements comprising emotional, mental, and physical requirements were reported by respondents on a scale averaging "sometimes" (M=3.309; SD=.0376). We assume that, given the nature of the work for both pedagogical and non-pedagogical staff, only 8% mentioned the physical demands of their work. Frequent emotional demands at work were declared by 46.2% of respondents, and frequent mental demands were expressed by 84.6% of respondents.

The other two JDR items focused on examining job roles, specifically their clarity and the incidence of conflict between multiple roles. The mean of the respondents' answers shows that role conflict rarely occurs (M=2.574; SD=.0533) and complementary to this, role clarity occurs frequently (M=4.429; SD=.0503). The majority of respondents (67.3%) indicated that they never or rarely encounter incompatible demands placed on their position. Most respondents also confirmed that they are clear enough about what they are supposed to do at work (88.7%) and what is expected of them at work (88.7%).

The research data recorded, on average, a low occurrence of harassment ( $M=1.104$ ;  $SD=.0169$ ) and personal conflicts in the workplace ( $M=1.64$ ;  $SD=.052$ ). A detailed analysis of the data shows that 3.8% of respondents often or always experience personal conflicts in the workplace, and 11.3% of respondents are frequently exposed to discrimination, bullying, threats of violence, or unwanted sexual attention in the workplace.

Workplace relationships were also associated with the item "team spirit," where the majority of respondents indicated that they feel good in their team (81.2%) and that there is usually a good atmosphere in their work team (79.3%).

Another explored area was bureaucracy, referring to the execution of professional organizational and administrative tasks. In this area, we asked our respondents about compliance with rules, regulations, and procedures in their employment. Regarding the frequent presence of unnecessary rules, procedures, and regulations, 29.3% of respondents expressed encountering them often, and an additional 29.3% mentioned encountering such rules only sometimes. At the same time, 45.9% of respondents stated that even though they encounter unnecessary regulations in their job, these rules do not hinder them in performing their work.

The last area of the JDR questionnaire focused on mapping reciprocity, i.e., the relationship between expended work effort and the reward received for the job done. 39.1% of the respondents stated that they receive sufficient value for the work they do, while 35.7% disagreed with this statement, and 24.8% of respondents expressed uncertainty.

- **Teachers' burnout syndrome**

To investigate the extent of burnout syndrome among Slovak teachers, we chose the Burnout Assessment Tool (BAT) as a research tool, currently used as an alternative to previously used tools, which we are currently adapting and validating in Slovakia.

According to the BAT concept, burnout syndrome is composed of several components, including core symptoms (exhaustion, mental distance, cognitive impairment, emotional impairment) and secondary symptoms (psychological complaints, psychosomatic complaints). Each of these components contains between 5 and 8 questions that respondents could answer using a Likert scale ranging from 1 (never) to 5 (always).

The analysis of the obtained empirical data was carried out using one-dimensional descriptive methods, the results of which are presented in the following table:

From the above data, we can see that symptoms of burnout syndrome rarely or never occur in the sample of teachers we studied ( $M=1.979$ ;  $p=.0308$ ). Despite this low prevalence of burnout syndrome, in the next section we discuss the analysis between the above JDR results and the BAT results.

Table 2 *Descriptive Statistics BAT (made by authors)*

N	Valid	266
	Missing	0
Mean		1,979
Std. Error of Mean		,0308
Median		1,924
Mode		1,5 <sup>a</sup>
Std. Deviation		,5019
Skewness		,677
Std. Error of Skewness		,149
Kurtosis		,163
Std. Error of Kurtosis		,298
a. Multiple modes exist. The smallest value is shown		

• **The correlation between job demands and burnout syndrome**

Table 3 shows the correlation coefficients between the selected variables of the JD-R model and the individual components of burnout syndrome found among Slovak teachers.

Table 3 *Correlation coefficients between selected variables of the JD-R model and BAT (made by authors)*

		exhaustion	mental distance	cognitive impairment	emotional impairment	psychological distress	psychological complaints	burnout
work overload	r	,516**	,388**	,348**	,291**	,405**	,370**	,506**
	p	,000	,000	,000	,000	,000	,000	,000
	N	265	265	265	265	265	265	265
emotional mental-physical demands	r	,387**	,190**	,158**	,172**	,256**	,285**	,327**
	p	,000	,002	,010	,005	,000	,000	,000
	N	265	265	265	265	265	265	265
role conflict	r	,406**	,453**	,303**	,323**	,375**	,370**	,472**
	p	,000	,000	,000	,000	,000	,000	,000
	N	265	265	265	265	265	265	265
harrassment	r	,158*	,273**	,112	,058	,203**	,143*	,203**
	p	,010	,000	,070	,351	,001	,020	,001
	N	264	264	264	264	264	264	264
role clarity	r	-,190**	-,255**	-,238**	-,195**	-,214**	-,147*	-,256**
	p	,002	,000	,000	,001	,000	,017	,000
	N	265	265	265	265	265	265	265
team spirit	r	-,354**	-,386**	-,177**	-,268**	-,376**	-,257**	-,392**
	p	,000	,000	,004	,000	,000	,000	,000
	N	265	265	265	265	265	265	265
	N	265	265	265	265	265	265	265

personal conflict	r	,221**	,281**	,206**	,324**	,257**	,162**	,299**
	p	,000	,000	,001	,000	,000	,008	,000
	N	264	264	264	264	264	264	264
reciprocity	r	-,224**	-,210**	-,075	-,122*	-,195**	-,181**	-,225**
	p	,000	,001	,223	,047	,001	,003	,000
	N	265	265	265	265	265	265	265
red tape (bureaucracy)	r	,408**	,385**	,297**	,291**	,327**	,340**	,437**
	p	,000	,000	,000	,000	,000	,000	,000
	N	264	264	264	264	264	264	264

R=Pearson correlate; p=Sig.(2-tailed); N=sample size

From the provided data, it can be inferred that individual components of burnout syndrome are in a moderately strong to strong positive correlation with work overload, emotional, mental, and physical demands, role conflict, and bureaucracy. There is a less strong positive correlation with the variables of harassment and personal conflict. A moderately strong to strong negative correlation is associated with the team spirit and reciprocity variables, and a weaker negative relationship is observed between burnout and role clarity.

### Conclusion

The main objective of our pilot study was to determine and analyse the prevalence of risk factors associated with burnout syndrome among Slovak teachers. To achieve this goal, we employed basic descriptive statistical methods and conducted a correlation analysis of data obtained through an electronic questionnaire divided into two key segments – job demands (JDR) and burnout syndrome (BAT). Based on the pilot study conducted, several factors were found to be associated with burnout syndrome among Slovak teachers. The findings of this study support the job demands-resources model, which proposes that job demands and resources have different effects on burnout. We consider the key findings of this pilot study to be the identification of a moderately strong to strong correlation between the occurrence of burnout syndrome and risk factors influencing its prevalence. These factors include work overload, emotional and mental demands, role conflict in the workplace, and personal conflicts among teachers.

The research results indicate that more than a third of teachers frequently have too much work in their profession, and almost half of the surveyed teachers often have to perform multiple tasks simultaneously. The research findings also highlight the fact that their work overload is compounded by the mental and emotional demands required by their job. In other research it was found out, teacher burnout has been associated with increased levels of attrition, stress, and decreased job satisfaction (Pillay et al., 2005). The workload model that neglects the welfare of faculty members contributes to stress and burnout, emphasizing the

need to prioritize teacher well-being in academic settings (Roos & Borkoski, 2021).

Based on our findings, we would like to call for the need for prevention and intervention aimed at preventing and reducing burnout syndrome among teachers, both on the part of teachers themselves and their employers. Addressing teacher burnout is crucial for promoting the well-being of educators and improving student outcomes.

In conclusion, we would like to note that a significant limitation of the conducted study is the size of the examined sample. In the future, it would be necessary to conduct such research on a larger and more representative sample of respondents.

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# STUDY OF THE MODERN PARADIGM OF EDUCATIONAL DIPLOMACY: THE CASE OF UKRAINE

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**Abstract.** *The article examines the modern paradigm of education diplomacy through the elements of public diplomacy instead of classical understanding of diplomacy, namely, the formation of the image of an educational institution, interpersonal relations of participants in the educational process and the definition of new content in the global educational space. Besides, a discourse analysis is conducted, the main tasks of education diplomacy are formulated and defined. The methodological foundations of education diplomacy functioning are considered basing on generalizations of the experience and observations covering this issue, which indicate the multi-vector nature and relevance of the proposed research.*

*Ukraine takes an important place in the development of global education diplomacy, due to positioning itself as a country of cultural and educational values on the international arena. The expert opinions of scientists studying the issue of education diplomacy from the point of view of current development, advantages and challenges are given in the article. An integral part of education is scientific diplomacy, which has been gaining special relevance, since the publication and content of educational and scientific literature determine not only education in general, but also the educational and informational context of the country, in particular.*

*Emphasizing positive trends and achievements in the field of education diplomacy, the authors, on the other hand, listed some problems and challenges in Ukraine, proposed relevant conclusions regarding the in-depth study of the issue. The result of the research was the proposed cluster model of educational diplomacy.*

**Keywords:** diplomacy, education diplomacy, paradigm, public diplomacy, scientific diplomacy, soft power.

## **Relevance of the problem**

In the changing world system, various transformations are taking place both in the field of communication, digitalization, and other areas. Countries carry out their bilateral cooperation through elements of public diplomacy such as cultural, social and educational, instead of the classical understanding of diplomacy, which uses elements of hard power, such as military and economic, applying the elements of soft power, which has been called "education diplomacy".

Education diplomacy, which is the result of globalization, denotes the phenomena of humanistic interaction of participants in the educational process including bearers of psychological and social competences, communicative culture as a means of achieving successful educational results, intercultural communication and international cooperation. The main task of educational diplomacy is the formation of the image of the educational institution and the interpersonal relations of the participants in the educational process. Education diplomacy is a response to modern challenges. It provides determination of the new content of relations and the mission of the organizational culture in educational institution and is oriented towards modern needs of teachers, students, scientists, the state and society, the optimal combination of all requirements into a single cultural and educational whole, following humanistic principles and tolerant rules.

## **Analysis of recent research and publications**

The methodological foundations of the study were formed on the basis of generalizations of the world, European and national experience of covering the issue of education diplomacy (Alanka, Cimen, 2023). The authors of certain scientific articles emphasize that modern generation is able to solve today's problems and challenges only through education. Global educational goals, such as the Sustainable Development Goal, cannot be achieved without cooperation, coordination and interaction between economic sectors and various non-state actors in the field of education and science, which increasingly influence international policy, funding structures and distribution of services and initiatives. Education diplomacy also covers issues of gender equality, inclusion, international certification, student exchange, etc. (Knight, 2022). The opinion of scientists of the National Academy of Pedagogical Sciences of Ukraine in the context of innovativeness of education diplomacy is definitely worth mentioning, as the innovations in education are considered to be "the process of creating, introducing and spreading new ideas, tools, pedagogical and management technologies in educational practice, resulting in increased achievements of structural components indicators (levels), as well as the system transitions to a qualitatively different state (Kremen, 2008).

Moreover, education diplomacy uses the tools of public diplomacy to facilitate effective collaboration between sectors and different actors to meet education challenges and advance a transformative agenda in education. Thus, the Institut de Diplomatie Publique develops programs and shares experiences, linking international relations and education with a special emphasis on its influence, which can be played by non-state structures in order to promote global mutual understanding (Duncombe, 2019). Therefore, studying the issue of education diplomacy shows the multi-vector nature of this problem and its relevance in the context of further research.

**The aim of the article** is to reveal the theoretical and practical aspects of education diplomacy, as a specific pedagogical system of relations which is studied, adapted and used by the participants of the educational process in the area of public diplomacy.

### **Presentation of the main research material**

Education diplomacy occupies a significant place in the dimension of public diplomacy, which is usually associated with the concept of soft power, therefore, educational activity is one of the elements of this power. As an example, the US and England accepted the potential of soft power to increase the international development level and in this context, they turned to educational activities, and the cross-cultural programs exchange between France and Germany created new opportunities to improve bilateral relations after the hundred years of wars that led to establishment of the European Union.

Education diplomacy consists of fundamental processes such as differentiation and integration of the participants' interaction in the educational process and provides for the relevant parameters, namely:

- a system of humanistic relations between the participants of the educational process;
- a system of acquired ideas, universal and individual cultural-linguistic, moral and social values, rules, norms, educational traditions, customs, knowledge, practices;
- a combination of external and internal motives and incentives, which communities and societies perceive as right ones;
- a structured ethical system of thinking and behavior models which characterize humanistic collective guidelines, moods and mentalities uniting a society;
- development of up-to-date digital literacy of population;
- implementation of SMART learning paradigm in education (Kulishov, 2023).

Ukraine takes an important place in the development of global education diplomacy, due to positioning itself as a country of cultural and educational values

on the international arena, especially in the conditions of global geopolitical challenges, which has become an extremely strong necessity in opposing Russia aggressive policy. Culture and education are quite effective weapons, and at the same time a strategy in a constant information war. However, education diplomacy should not be exclusively limited to tasks in the field of foreign policy. While meeting the latest requirements of society, it participates in its formation, taking into account own experience and plans for the future.

The paradigm of education diplomacy as a policy, together with its components, can and should be a part of the state policy, but only if it meets the current needs of society, and the implementation of an effective policy of such diplomacy is impossible without providing appropriate analytics, which allow more clearly defining the goals and correlate the following actions with them (Hololobov, 2022). Scientists A. Atamanenko and N. Martynyuk (2022) emphasize the paramount importance of gaining the world experience and, following the example of the USA and other developed countries, introducing a special position in the Ministry of Foreign Affairs of Ukraine for an official who will deal with the solution of certain issues of education or scientific diplomacy (Atamanenko, & Martyniuk, 2022). Besides, N. Makhinya (2021) points out that currently there is no consistent approach of the state government regarding the implementation of the policy of cultural, scientific and education diplomacy, it lacks tools, strategy and institutional foundations (Makhinya, 2021).

Programs for the development of national education systems of various countries in most of their key tasks and priorities have provisions for the participation of universities and research centers in programs of international inter-university cooperation. Universities of Ukraine are not exceptions in these processes. They have similar set of tasks among which are such as follows: attracting additional funding for the development of science, material and technical base, participation in international programs for the mobility of students and teachers through participation in programs financed by the EU and other funds and international organizations. The value of educational diplomacy is very actively increasing due to its high efficiency and practically free nature for states.

Education diplomacy is less attractive in terms of long-term effects and consequences of its activities, but it is extremely promising, especially for Ukraine. The state has developed an extensive network of higher education institutions which have fairly close international ties and a huge potential to influence foreign audiences through politicians, diplomats, scientists, foreign students, educators from foreign countries, etc. Universities are the basis of knowledge diplomacy, which ensure the direction of people, knowledge and mutual understanding between peoples, because it is around universities that representatives of different countries, non-governmental organizations and companies can unite quite freely in search of ways to solve global and national educational problems.

While positioning themselves in the highly competitive global market for higher education goods and services, the universities should use the tools of effective international cooperation, which is at the heart of the internationalization of university training, internships, training and research opportunities, and therefore should be seen as an imperative of their strategy development, because it is primarily about the quality and improvement of knowledge (Trofymenko, 2019). In the past, Ukrainian diplomacy and academic mobility wished much to be desired. There was no clear strategy for the implementation of the principles and directions of the foreign policy strategy, there were not only the resources that would be needed for this, but also specialists who could raise the diplomatic educational vector of development to a qualitatively new level, schools that could teach how to use the word as modern weapons and mechanisms through which it would be possible to explain to society what is really necessary (Tereshchuk, 2019).

Scientific diplomacy is an integral part of education, since most modern universities tend to follow a pattern in which their activities are possible only in an inseparable combination of scientific, educational and commercial activities. In Ukraine, this issue becomes particularly relevant, since the publication and content of educational and scientific literature determine not only education, but also the educational and informational context of the country, in particular. Despite a number of unresolved issues that require a clear solution, the publishing of scientific literature has grown in recent years, compared to the first years of Ukraine's independence. This is evidenced by statistical data, according to which, in 1991, 5.8 thousand units of scientific publications were published, and as for 2021, these indicators reached 13.8 thousand units (Senchenko, Buriak, 2021).

The main tasks of scientific and education diplomacy of Ukraine are to create appropriate conditions for effective international cooperation in the field of education and science and the dimensions of the work of public diplomacy subjects in the field of this diplomacy are as follows:

- promoting the educational potential of Ukraine;
- assistance in attracting foreign students to study in Ukraine;
- popularization of Ukraine as a favorable country for the development of global educational and scientific programs;
- implementation of scientific and technical achievements in the real sector of the economy;
- support of international cooperation in the field of education and science;
- further promotion of joint international research, scientific and educational exchanges, mobility programs of students, teachers and scientists.

The professors and teachers of the State University of Economics and Technology (Ukraine) and the Bukhara State University (Uzbekistan) have made

an essential contribution to the development of global education and scientific diplomacy. In particular, the textbooks for students of economics were jointly prepared and published in two languages under the general editorship of V. Kulishov, namely: "Microeconomics", 2020, "Macroeconomics", 2021 and "Micro-macroeconomics", 2022, and in cooperation with the international author team of Ukraine (State University of Economics and Technology), Latvia (Rezekne Academy of Technology), Portugal (University of Evora), Poland (Pedagogium University) and Uzbekistan (Bukhara State University)) was published in Ukrainian and Polish, and the textbook "Global Economy: Formation, Transformations, Challenges" edited by V. Kulishov, Prague, OKTAN PRINT, 2023 is also planned to be published in English and Uzbek languages (Kulishov, 2023).

Ukrainian diplomatic institutions play an important role in determining geographical priorities for the promotion of educational opportunities in the strategy of public diplomacy, among which are Argentina, Morocco, Kuwait, Oman, Jordan, UAE, Qatar, Saudi Arabia, China, India, Turkey, Nigeria, Malaysia, Israel (Kuleba, Japarova, Lypyatzka, 2021). Taking into consideration the presence of global and local (national) poles in the modern contradictions of the development of higher education and its management system, there is a necessity to implement the approaches of education diplomacy in the theoretical development and practical implementation of strategies for the entry of Ukrainian higher education institutions into the European educational space (Kyvliuk et al., 2018).

Currently, in order to successfully use the tools of educational and scientific diplomacy, it is absolutely necessary to systematically increase state funding of education and science, as well as to direct practical attention to the possibilities of educational diplomacy and its tools in external relations with neighboring countries (Cheberkus, 2020). Therefore, it is necessary to reach a qualitatively new level of public and education diplomacy through careful studying and promoting the experience of other countries, improving media communications by diversifying communication channels, conducting explanatory work among foreigners abroad and in Ukraine, improving foreign languages skills, attracting foreign investments, concluding partnership agreements with world universities, adapting the educational system to global standards of higher education, developing cultural exchange, organizing special funds and creating state programs for the development of academic mobility.

Therefore, in the course of the study, according to the authors, a cluster of interconnected systems of educational diplomacy is being built, and based on the above, we have developed and proposed for professional discussion a theoretical model of cluster educational diplomacy (Fig. 1).

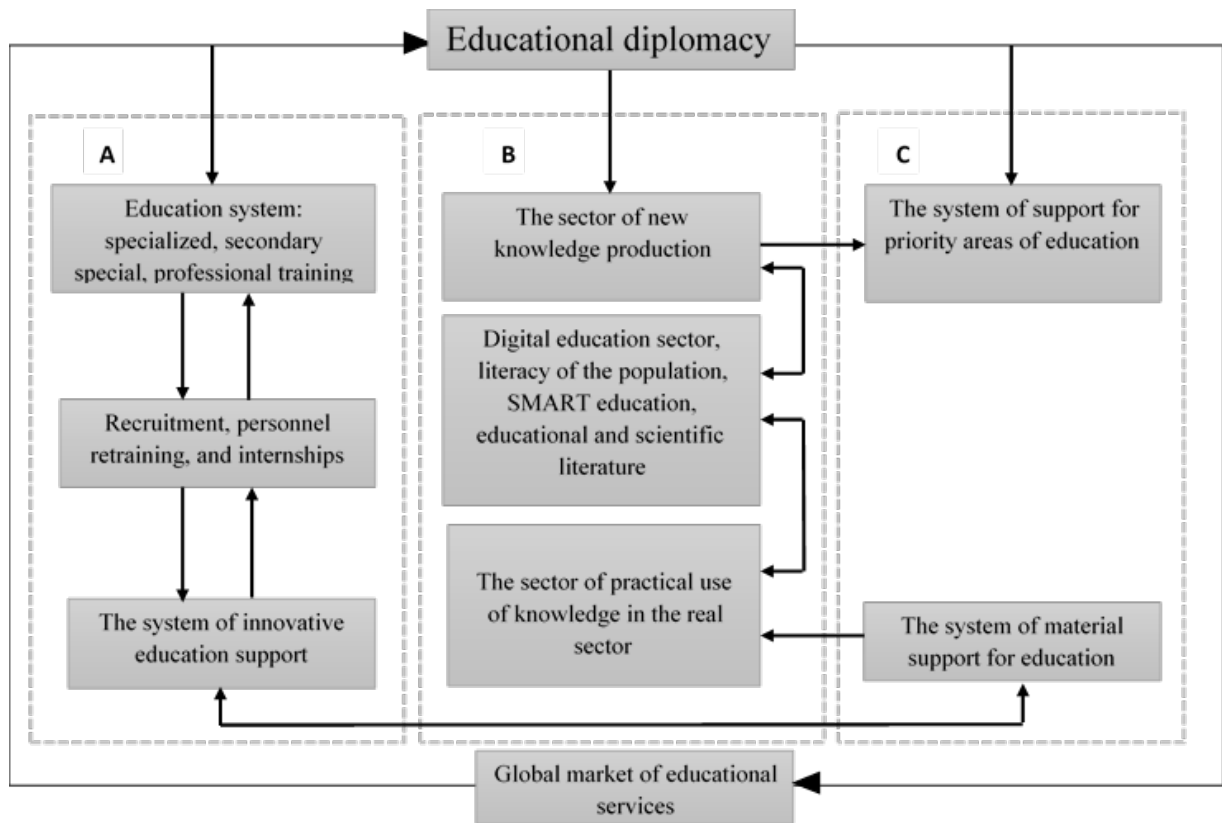


Figure 1 Theoretical model of cluster educational diplomacy (created by authors)

Despite a number of positive achievements and the gradual establishment of international diplomatic relations not only at the political, but also at the educational and scientific levels, it is significant to point out the main challenges and problems of education diplomacy in Ukraine such as the following ones:

- firstly, the international reputation of education in Ukraine leaves much to be desired. Ukrainian universities need to improve their international reputation and the quality of education in order to attract foreign students and teachers. According to the QS World University Rankings, not a single Ukrainian university is among the top 500 universities in the world;
- secondly, the low competitiveness and lack of English-language university programs make it difficult to attract foreign students;
- thirdly, language barriers, which make Ukrainian language a certain obstacle for foreigners who want to study in Ukraine. Most of the study programs are offered in the Ukrainian language, and it complicates the access of foreigners to Ukrainian education;
- fourthly, qualifications exchange and recognition of scientific degrees. Ukraine should cooperate more actively with international organizations and other countries regarding the acceptance of Ukrainian

- scientific degrees and ensuring their acknowledgement in other countries;
- fifthly, insufficient financing of Ukrainian educational diplomacy limits the country opportunities in the development of international educational programs and exchanges. According to the Ministry of Education and Science of Ukraine, the amount of funding for international educational programs and scholarships is insufficient to meet the demand for them;
  - finally, marketing strategy is absolutely insufficient. Ukraine has the potential to become an attractive country for foreign students through an active marketing campaign to promote its educational services abroad.

## Conclusions

In the context of the aggravation of global geopolitical challenges and the increase in the international competitiveness of education, the diplomacy of Ukraine has both certain achievements and problems on the way to the implementation of education diplomacy, among them are the lack of large-scale state funding of academic mobility programs; licensing and accreditation issues; engaging stakeholders, including educational institutions, public organizations and the private sector; expansion of public and private partnership; creation of infrastructure for investments, including foreign ones; development of distance learning programs.

In the future, Ukrainian education diplomacy should play an important role in improving the quality of education in the country and contribute to the international recognition of Ukrainian educational institutions. Correctly set tasks, increased interest in this educational component on the part of the government, and further improvement of the strategy will make it possible to attract the attention of the mass foreign public to Ukraine, and therefore, it requires further in-depth research, which is indicated by the works of domestic researchers regarding the existence of a number of problematic issues.

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# PERSONU, KAS IZDARA NAIDA NOZIEGUMUS, KRIMINĀLO AKTIVITĀŠU MOTIVĀCIJA UN TO PREVENCIJAS STRATĒGIJAS

## *Motivation Of Criminal Activities Of Persons Committing Hate Crimes And Prevention Strategies*

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**Abstract.** *The study aims to analyze the motivation of hate crime perpetrators to commit a hate crime and to analyze the possibilities for preventing hate crime in the context of education. The study's tasks are to find out what motivating factors a person has in committing hate crimes as well as analyze the role of hate as an emotion in committing crimes. The role of education and the opportunities offered through education to reduce hate crime will also be assessed. The focus of the study is based upon the increasing focus of the European Union on reducing hate crimes in the Member States and the high impact of education on personal development, which can be a determining factor in a person's tendency to commit crimes. The results of the study will be able to be used in educational institutions to gain more detailed insights into factors motivating hate crimes so that pedagogical approaches can be developed and improved in order to reduce the tendency of individuals to commit hate crimes. The study will use the descriptive method to describe the personality and motivation of hate criminals to commit hate crimes, as well as a data analysis to draw conclusions about factors motivating crime.*

**Keywords:** *hate crime, motivation, prevention strategies, role of education.*

### **Ievads**

#### ***Introduction***

2021. gada 9. decembrī Eiropas Komisija pieņēma ziņojumu “Iekļaujošāka un aizsargājama Eiropa: ES noziegumu saraksta paplašināšana, iekļaujot tajā naida runu un naida noziegumus,” tādējādi akcentējot, ka naida noziedzība ir problēma, ar kuru ES ir gatava cīnīties, lai to samazinātu un pat novērstu (European Commission, n.y.). Naida noziegumu būtības pamatā ir personas psiholoģiskā attieksme pret upuri kā daļu no kādas konkrētas kopienas. Šāda noziedzīga nodarījumu specifika rada nepieciešamību precīzi izprast naida noziegumu izdarītāju motivāciju un kriminogēnos faktorus, kas veicina personas izdarīt noziedzīgus nodarījumus, ko motivē naidis, lai būtu iespējams izstrādāt veiksmīgus un precīzi virzītus preventijas pasākumus. Ņemot vērā to, ka naida

noziegumos motivācija ir psiholoģiska nevis piem., materiāla rakstura, tad prevencijas stratēģijām primāri ir jābūt plānotām un virzītām uz potenciālā pārkāpēja uzskatu un aizspriedumu ietekmēšanu.

Viens no prevencijas līdzekļiem, kas ir mērķēts uz personas uzskatu ietekmēšanu, var būt arī izglītība. Apvienoto Nāciju Izglītības, zinātnes un kultūras organizācija (UNESCO) savā publikācijā “Naida runas risināšana ar izglītības palīdzību. Politikas veidotāju rokasgrāmata” uzsver, ka izglītībai var būt galvenā nozīme, lai apkarotu naidīgus naratīvus un uz grupām vērstas vardarbības rašanos (UNESCO, 2023). Ārvalstu zinātniskajā literatūrā ir konstatēts, ka lielāko daļu naida noziegumu izdara jauni vīrieši vai pusaudži ar zemiem sasniegumiem izglītībā (Entorf, Lange, 2023), kas ļauj identificēt zemāku izglītības līmeni kā kriminogēno faktoru naida noziedzībā. Šie uzskaitītie faktori norāda uz to, ka pastāv naida noziedzības kriminogēnie un antikriminogēnie faktori. Būtiski ir ne tikai spēt identificēt riska faktorus, bet arī, balstoties uz šo izpratni, izstrādāt konkrētākus, precīzāk mērķētus prevencijas pasākumus naida noziedzības mazināšanai.

Pētījuma mērķis ir raksturot naida noziegumu subjektus un to kriminālo aktivitāšu motivējošos faktorus, un izglītības, tostarp neformālās izglītības, lomu naida noziedzības prevencijā. Pētījumā tiek veikta dokumentu, datu un pētījumu analīze. Lai izdarītu secinājumus un sniegtu priekšlikumus, tiks izmantota dedukcijas metode.

### **Naida noziegumu subjekti un to motivācija** *Hate crime subjects and their motivations*

Par naida noziegumiem tiek uzskatīti noziedzīgi nodarījumi, kas pastrādāti, balstoties uz rasistiskiem vai ksenofobiskiem motīviem, reliģiskiem aizspriedumiem, personas invaliditātes, seksuālās orientācijas, dzimuma identitātes, dzimuma izpausmes un citiem aizspriedumiem (Eiropas Savienības Pamattiesību aģentūra, 2021). Naida noziegumu identificēšanai un nošķiršanai no citiem noziedzīgiem nodarījumiem ir svarīgi izprast konkrētā noziedzīgā nodarījuma subjekta psiholoģisko attieksmi pret cietušo un motivāciju izdarīt noziedzīgu nodarījumu.

Naida noziegumi tiek uzskatīti par bīstamākiem, jo tie tiek vērsti pret personu pēc kādas pazīmes, kas raksturo plašāku personu grupu un var radīt nelabvēlīgas sekas, piemēram, bailes un apdraudējuma sajūtu visiem konkrētās kopienas pārstāvjiem. Ar naida motīvu pastrādāto noziedzīgo nodarījumu bīstamību akcentē arī RSU asociētais profesors Jānis Baumanis, norādot, ka naidam, atšķirībā no citām līdzīgām negatīvām emocijām, ir raksturīga lielāka ļaunuma un nelabvēlības pakāpe (Baumanis, 2017, 205). Svarīgi uzsvērt, ka naida nozieguma izdarīšanā pārkāpējs ir rīkojies ne tāpēc, lai apmierinātu mantkārīgu vai kādu citu nolūku, bet gan tādēļ, lai izpaustu savas negatīvās emocijas,

sabiedrībā nepieņemamā veidā, pret kādu citu personu vai personām, pret kuru izjūt nepatiku.

Lai arī Latvijas Republikas Krimināllikumā nav atsevišķi izdalīti naida noziegumi kā noziedzīgi nodarījumi, to sastāvs pārklājas ar citu noziedzīgu nodarījumu sastāvu. Atsevišķa panta par naida noziegumiem neesamība Krimināllikumā nenozīmē, ka naida noziegumus nav iespējams identificēt, jo Krimināllikuma 48.panta pirmās daļas 14.punkts paredz, ja noziedzīgs nodarījums izdarīts rasistisku, nacionālu, etnisku vai reliģisku motīvu vai sociālā naida dēļ (LR Saeima, 1998), tad šāds motīvs ir kvalificējams kā atbildību pastiprinošs apstāklis.

Valsts policija 2022. gada pārskatā pie naida noziegumiem izdala četru veidu pārkāpumus Krimināllikuma izpratnē:

- 174/1 pants. Genocīda, nozieguma pret cilvēci, nozieguma pret mieru un kara nozieguma attaisnošana;
- 78.pants. Nacionālā, etniskā un rasu naida izraisīšana;
- 149.1 pants. Diskriminācijas aizlieguma pārkāpšana;
- 150.pants. Sociālā naida un nesaticības izraisīšana (Valsts policija, b.g.).

Valsts policija visvairāk kvalificējusi tieši naida noziegumus pēc Krimināllikuma 78. panta, 2022. gadā konstatējot astoņus noziedzīgus nodarījumus (Valsts policija, b.g.). Ar tik nelielu konstatēto naida noziegumu skaitu ir jāņem vērā arī latentās noziedzības iespējamība, kas naida noziegumiem ir raksturīga. Vairākos naida noziegumu gadījumos upuri to uztver kā normu un izvēlas par noziegumu neziņot (Dupate, 2023), kas veido nepilnīgu statistiku par naida noziegumiem.

No Valsts policijas uzskaitījuma tomēr nav iespējams gūt pilnīgu izpratni par to, vai konstatētie noziedzīgie nodarījumi ir izdarīti tieši ar naida motīvu, jo konkrētajos pārkāpumos naidis kā attieksme nav kvalificējošā pazīme nodarījumam. Krimināllikumā gan 78.pantā, gan 150.pantā naidis tiek minēts kā noziedzīga nodarījuma sekas nevis noziedzīga nodarījuma motivācija (LR Saeima, 1998). Arī Baumanis J. norāda, ka Krimināllikuma 78. un 150.pantā nav obligāti nepieciešams pierādīt, ka noziedzīgs nodarījums izdarīts ar naida motīvu (Baumanis, 2017, 210), jo minētajos pantos likumdevējs paredzējis, ka sodāma ir tieši naida izraisīšana. Rezultātā ir apgrūtināta Valsts policijas statistikas interpretēšana, jo ir iespējami scenāriji, kuros konkrētie noziedzīgie nodarījumi izdarīti citu motīvu dēļ. Detalizētāku secinājumu izdarīšanai par uzskaitītajiem noziedzīgajiem nodarījumiem nepieciešams precizēt, cik no šiem nodarījumiem ir konstatēti arī Krimināllikuma 48.panta pirmās daļas 14.punktā minētais atbildību pastiprinošais apstāklis (LR Saeima, 1998).

Raksturojot naida noziedznieku kā personību, ārvalstīs veiktajos pētījumos visbiežāk tiek secināts, ka no sabiedrības iedalījuma pēc sociālās piederības grupām, visbiežāk naida noziegumus izdara vīrieši. 2023. gada psihometrikas

pētījumā par naida motivētu uzvedību tiek secināts, ka vīriešiem ir gandrīz divas reizes lielāka tendence rīkoties ar naida motīvu, kamēr vispopulārākā grupa, pret kuru var tikt vērsta naida motivēta rīcība, ir pēc upura politiskajiem uzskatiem (Cramer, Cacace, Sorby, Adrian, Kehn, and Wilsey, 2023). Tikmēr pētījumā par naida noziedznieku tipoloģiju tiek norādīts, ka lielāko daļu naida noziegumu izdara jauni vīrieši, kuriem ir svarīga cieņa no vienaudžiem, (McDevitt, Levin, Bennett, 2002), šo kritēriju akcentējot, kā vienu no naida noziedzību motivējošiem faktoriem. Savukārt Latvijā tiek novērota krasi atšķirīga situācija ar biežākajiem naida noziegumu izdarītājiem.

Par situāciju ar naida noziegumu izdarītājiem Latvijā Dr. Iur. Ēriks Treļš pētījumā par naida noziegumiem Latvijā, kriminālatbildību un piemērotajiem sodiem, balstoties uz Latvijas Republikas Augstākās tiesas tiesu prakses apkopojumu par naida runu, konstatē, ka statistiski vidējais naida nozieguma izdarītājs Latvijā ir 41 gadu vecs vīrietis (Treļš, 2019). Lai arī Treļa Ē. izpēte palīdz raksturot vidējo pie kriminālatbildības par naida noziegumu saukto personu Latvijā, ir jāņem vērā divi šo raksturojumu ietekmējoši faktori. Pirmkārt, eksperti vērš uzmanību uz augstu latentās naida noziedzības īpatsvaru Latvijā, kas var radīt maldinošu iespaidu par vispārējo naida noziedzības biežumu. Otrkārt, analizētajā tiesu prakses apkopojumā apsūdzētas 26 personas, taču apkopojums ir par laika periodu no 2012. gada oktobra līdz 2018. gada maijam, kas ir pietiekošs ilgs periods, taču apsūdzēto personu skaits ir neliels un, apvienojot to ar iepriekš minēto par augstu latentās naida noziedzības īpatsvaru, nav iespējams precīzi raksturot naida noziegumu izdarītāju, bet ir iespējams tikai aprakstīt pie kriminālatbildības sauktos naida noziegumu izdarītājus. Tomēr šāda izpēte par pie atbildības sauktajiem naida noziedzniekiem ļauj secināt, ka situācija Latvijā ar naida noziegumiem ievērojami atšķiras no ārvalstu pieredzes, kur naida noziegumus biežāk izdara jaunieši.

Cieņas iegūšana un sociālās piederības sajūta, it īpaši jauniešu vidū, var darboties kā spēcīgs kriminogēnais faktors vidē, kurā naida noziegumi tiek uzskatīti par pieņemamiem un to bīstamība tiek noniecināta. 2021. gadā publicētajā pētījumā tiek secināts, ka pusaudžu vidē vienaudžu deviantajam spiedienam un iepriekšējai iespējai būt par naida nozieguma liecinieku ir viens no kriminogēnajiem faktoriem naida noziedzībā (Wachs, Wettstein, Bilz, Krause, Ballaschk, Kansok-Dusche, and Wright, 2022). Arī Likona T. akcentē vienaudžu spiediena nozīmi, norādot, ka bērniem ir paaugstināta iespēja pārkāpt likumu, ja viņi zina, ka par to uzzinās vienaudži (Likona, 2000, 14). Tāpat arī labvēlīga vide, kurā naida noziegumi nav pieņemami var pildīt prevencijas funkciju un atturēt personu no naida nozieguma izdarīšanas.

Īpaši pusaudžu vidū, personas attīstības periodā, kad persona apgūst emociju kontroli un pirmreizēji piedzīvo dažādas emocijas, naida nošķiršana no citām negatīvām emocijām ir apgrūtināta. Baumanis J. vērš uzmanību, ka šobrīd krimināltiesību teorijā nav noteikti konkrēti kritēriji, kas naidu varētu nošķirt no

neapmierinātības, nomāktības, izmisuma, sarūgtinājuma, bailēm, šausmām vai pat greizsirdības (Baumanis, 2017, 205), kas jauniešu vidū var līdzdarboties kā motivējošs faktors naida nozieguma izdarīšanā.

Izglītības un zinātnes ministrija (turpmāk IZM), jauniešu konsultāciju par iekļaujošu sabiedrību ietvaros, arī akcentē plašo negatīvo emociju spektru kā iemeslu neiekļaujošai sabiedrībai. Konsultāciju laikā IZM noskaidroja, ka arī zemu pašvērtējumu, bailes, sabiedrības neiecietību un pat naidu pret atšķirīgo jaunieši min kā būtiskus šķēršļus iekļaujošai sabiedrībai (Izglītības un zinātnes ministrija, 2024). Iepriekš minētajā jauniešu aptaujā par būtisku faktoru neiecietīgai videi norāda arī cilvēku pašu attieksmi un nepietiekamu izpratni par cilvēkiem ar ierobežotām spējām (Jaunatnes lietas, 2024), kas ir viens no faktoriem, kura ietekmi uz neiecietīgu vidi, ir iespējams risināt ar sabiedrības grupu, it īpaši jauniešu, izglītošanu.

No analizētajiem avotiem var izdalīt divu veidu motivācijas naida noziegumu izdarīšanai. Kā pirmo var definēt personas psiholoģisko attieksmi, esošos aizspriedumus un nepatiku pret citām sabiedrības grupām. Savukārt kā otra veida motivāciju var definēt ārējos faktorus, kas nav saistīti ar jau esošiem personas uzskatiem. Pie ārējām naida noziegumu motivācijām var pieskaitīt grupas spiedienu, vēlmi iederēties un neatšķirties, kā arī savas kopienas uzskati un attieksme gan pret naida noziegumiem, gan vispārēji pret noziedzīgiem nodarījumiem. Šāds naida noziegumu motivāciju sadalījums un tā pielietošana naida noziegumu analīzē ļauj detalizētāk izprast, kas konkrēti motivēja personu izdarīt naida noziegumu. Motivāciju nošķiršana un precīzāku naida noziegumu subjektu identificēšana sniedz iespējas rast efektīvākus un konkrētākus preventijas pasākumus naida noziegumu novēršanā. Tomēr svarīgi ir ņemt vērā, ka abu veidu motivācijas ir savstarpēji saistītas un viena otru papildina, motivējot vai arī tieši atturot no naida nozieguma izdarīšanas.

### **Naida noziegumu prevencija izglītības kontekstā** *Prevention of hate crimes in context of education*

Naida noziegumu prevenciju apgrūtina valsts un sabiedrības ierobežotās iespējas ietekmēt personas uzskatus. Personas tiesības uz uzskatiem un to paušanu kā viena no pamattiesībām ir nostiprinātas Latvijas Republikas Satversmes 100.pantā, kas nosaka, ka ikvienam ir tiesības uz vārda brīvību, kas ietver tiesības brīvi iegūt, paturēt un izplatīt informāciju, paust savus uzskatus (Satversmes Sapulce, 1922). Tomēr uzskatu un to paušanas brīvība nevar kalpot kā naida noziegumu attaisnojošs iemesls. Tādēļ naida noziegumu novēršanā ir svarīgi norobežot personas uzskatus no noziedzīga nodarījuma. Personai ir tiesības izjust naidu vai nepatiku pret kādām sabiedrības grupām, taču ir novēršama tieši šo sajūtu materializēšana naida noziegumā.

Prevencijas stratēģijām kā mērķtiecīgiem naida noziedzību mazinošiem pasākumiem nav jāietekmē personas uzskati un naida esamība, tiem ir jānovērš personas vēlme realizēt savus naida motivētos nolūkus. Savukārt naida runas gadījumā ir jānovērš vēlme publiski paust naidu motivējošus un izraisošus uzskatus. Naida noziegumu, it īpaši naida runas gadījumos, jāizvērtē arī prevencijas stratēģiju ētika un ietekme uz Latvijas Republikas Satversmes 100.pantā garantētajām tiesībām. Groma J. pētījumā par naida noziegumu prevenciju un apkarošanu secina, ka tikai rūpīgi pārbaudīta rīcības plāna pastāvēšana, ko atbalsta gan valdība, gan sabiedrība, gan tiesībsargājošās institūcijas, nodrošinās augstu rezultātu efektivitāti ilgtermiņā (Groma, 2018). Īpaši svarīga ir tieši sabiedrības attieksme pret naida noziegumiem, jo naida noziegumu kaitīgums aptver arī sabiedrību un sabiedrības interesēs ir dzīvot drošā vidē.

Dati par naida noziedzību nav pilnīgi un pētījumi norāda, ka par naida noziegumiem bieži vien neziņo pietiekoši (Eiropas Savienības Pamattiesību aģentūra, 2009), kas liecina par augstu latentu naida noziegumu īpatsvaru. Tomēr arī šo datu analīze uzskatāmi pierāda, ka naida noziegumu izdarītāju vidū nesamērīgi tiek pārstāvēti jaunieši un nepilngadīgie (Steinberg, Brooks, Remtulla, 2003). Augstais jauniešu pārsvars naida noziegumu izdarītāju vidū sniedz iespēju veidot naida noziedzības prevencijas stratēģijas, kas vērstas uz izglītības iestādēm, lai tās pilnvērtīgāk novērstu naida noziegumiem labvēlīgu vidi. Izglītības iestādes pilda ne tikai izglītošanas funkciju, bet arī socializācijas funkciju jauniešiem, kā rezultātā tā var kalpot kā prevencijas instruments un mazināt kriminogēnos faktorus jauniešu vidē.

Naida noziedzību jauniešu vidū nevar skatīt kā noziedzīgu nodarījumu, kurā ir tikai skaidri definētas upura un pāridarītāja lomas. Pētījumā par jauniešu iesaisti organizētajā noziedzībā tiek norādīts, ka jauniešu vidū robeža starp noziedzīga nodarījuma izdarītāju un upuri ir izplūdusi (Thompson, 2019). Naida nozieguma izdarītāju var vērtēt ne tikai kā jaunieti, kurš izdarījis noziedzīgu nodarījumu aiz naida, bet arī kā jaunieti, kam ir problēma ar negatīvo emociju kontroli sabiedrībai pieņemamā veidā. Šāda vainīgās personas pielīdzināšana upurim nozīmē, ka problēmu var risināt ne tikai ar sodīšanu, bet gan arī ar pozitīvu motivāciju sabiedrībai pieņemamas uzvedības veicināšanā un socializāciju.

Eiropas Jaunatnes dialoga aptaujā jaunieši paši atzīst, ka neiecietības mazināšanā pozitīvs atbalsts ir ārpusskolas nodarbības un aktivitātes, ko īsteno jauniešu centri (Jaunatnes lietas, 2024). Brīvprātīgās ārpusskolas nodarbības jauniešiem ļauj iepazīt citus jauniešus, komunicēt ar dažādiem cilvēkiem un socializēties, veidojot plašāku pasaules uztveri. Pie ārpusskolas aktivitātēm ir svarīgi ņemt vērā, ka interešu izglītības programmās (pulciņos un nodarbībās), kas tiek organizētas tiesību aktos noteiktajā kārtībā un ir ar pieaugušā uzraudzību, satiekas jaunieši ar kopīgām interesēm, kas veicina labvēlīgāku vidi, kas tendēta uz socializēšanos pat tad, ja jauniešiem ir aizspriedumi pret kādiem nodarbību

dalībniekiem. Tieši kopīgo interešu faktors var palīdzēt jauniešiem uzsākt komunikāciju un socializēties ar cilvēku grupām, pret kurām citos apstākļos izjustu naidu vai nepatiku.

Savlaicīga jauniešu socializācija ar ārpuskolas nodarbībām var kalpot kā savlaicīgs prevencijas līdzeklis naida noziedzības novēršanai, tomēr ne visus naida noziedzību motivējošos faktoros ir iespējams novērst tikai ar socializēšanos. Pētījumā par paškontroli, piedzīvojumu meklēšanu un noziedzību tiek norādīts, ka cilvēki, kuri stipri tendēti uz piedzīvojumu meklēšanu gūst apmierinājumu no riskantām situācijām, kamēr cilvēki ar zemu piedzīvojumu meklēšanas tieksmi pat riskantas situācijas var uztvert par sāpīgām un nevēlamām (Burt, Simons, 2013). Papildinot atsevišķu jauniešu vēlmi labprātīgi meklēt riskus ar Likona T. (2000) pausto secinājumu par paaugstinātu vēlmi jauniešiem izdarīt noziedzīgus nodarījumus, ja tie zina, ka citi jaunieši to redzēs, var veidoties nelabvēlīgas jauniešu grupas, kuras ir tendētas uz noziedzīgu nodarījumu, tostarp naida noziegumu, izdarīšanu.

Skolu vidē visefektīvāk savlaicīgi pamanīt kriminogēnajiem faktoriem pakļautos jauniešus var gan citi skolēni, gan skolotāji, gan skolas administrācija, it īpaši sociālie pedagogi. Izglītojot jauniešus par naida noziegumiem ir iespējams veicināt savlaicīgu ziņošanu par naida noziegumiem, kas mazinātu latentās naida noziedzības īpatsvaru un ļautu savlaicīgi identificēt jauniešus, kuri izdara naida noziegumus. Plašāka ziņošana par naida noziegumiem arī ļautu iegūt precīzāku naida noziedzības statistiku, kas sniegtu iespējas īstenot konkrētākas un mērķtiecīgas prevencijas stratēģijas. Sociālo pedagogu loma ir īpaši svarīga naida noziedzības mazināšanā jauniešu vidū. Darbā ar kriminogēnajiem faktoriem pakļautajiem jauniešiem, sociālajiem pedagogiem ir nepieciešams ne tikai pašiem spēt identificēt šos jauniešus, bet ir svarīgi, lai sociālajiem pedagogiem tiktu sniegti gan valsts, gan pašvaldības, gan skolas atbalsts un līdzekļi efektīvai intervencei.

Jauniešu naida noziedzība arī nav skatāma tikai un vienīgi skolu un jauniešu vides kontekstā. Jāņem vērā, ka jaunieši ir topošie pieaugušie, kuri, ja savlaicīgi nav saņēmuši atbalstu un ar tiem nav uzsākts socializācijas darbs vai saņemts sods par izdarītu naida noziegumu, tad pastāv augsta iespējamība, ka arī nākotnē konkrētajam jauniešiem saglabāsies augsta tolerance pret naida noziegumiem.

## **Secinājumi** **Conclusions**

Ārvalstu pētījumu dati liecina, ka jauni vīrieši izdara lielāko daļu no naida noziegumiem. Tomēr Latvijā novērojama atšķirīga tendence, ka visbiežāk pie kriminālatbildības par naida noziegumiem tiek saukti vīrieši pusmūža vecumā.

Pastāv augsts latentās naida noziedzības īpatsvars, kas novērojams arī Latvijas datos par naida noziedzību, kur Valsts policija visvairāk naida



noziegumus kvalificējusi pēc Krimināllikuma 78.panta. Tomēr Valsts policijas sniegto datu interpretācija nepilnīgi sniedz izpratni par to, vai konkrētie nodarījumi izdarīti ar naida motīvu, jo Valsts policijas uzskaitītajos Krimināllikuma pantos naidis ir kā noziedzīga nodarījuma sekas nevis motīvs. Pilnīgākai izpratnei par naida noziedzību ir nepieciešams konkrētajiem nodarījumiem ņemt vērā, vai ir konstatēts Krimināllikuma 48.panta pirmās daļas 14.punktā minētais atbildību pastiprinošais apstāklis.

Izglītības iestādes var kalpot kā prevencijas rīks naida noziedzībā, jo izglītības iestādes pilda arī socializācijas funkciju, kas ir svarīgs naida noziedzības antikriminogēnais faktors. Jaunieši norāda arī uz ārpusskolas aktivitātēm kā efektīvu metodi naida un aizspriedumu mazināšanā. Skolām nepieciešams savlaicīgi identificēt un uzsākt prevencijas darbu naida noziedzības kriminogēnajiem faktoriem pakļautajiem jauniešiem, lai mazinātu arī naida noziedzību nākotnē, pieaugušo vidū.

## Summary

Everyone has the right to feel hatred or distaste for some groups in society, and it is not necessary to directly influence their emotions, but it is precisely the materialisation of these feelings in a hate crime that is preventable. Such a recognition also makes it harder to prevent hate crime, including the fact that hatred as an emotion is a person's individual and internal attitude, the views of the world.

The existing legislation makes it difficult to draw precise conclusions on hate crimes, since hatred is an aggravating circumstance instead of motive and is not included as a qualifying circumstance in the provisions listed as hate crimes. Available statistics on hate crimes are incomplete, experts also point to a high rate of latent hate crimes, citing victims' reluctance and shame to report hate crimes as factors.

The priority of anti-hate crime work is that young people, as adults of the future, learn socially acceptable norms of behaviours at school, which at the same time provides opportunities for timely action to prevent anti-social behaviour among young people. Studies recognise the importance for young people of a sense of belonging and beliefs of those around them, which can fulfil the criminogenic factor function of hate crime in disadvantaged youth environments. In order not to promote hate crime, it is important not to promote high tolerance for hate crimes in youth communities.

Timely reporting and identifying hate crimes can help schools identify young people exposed to the criminogenic factors of hate crimes in a timely manner to start resocialising them and correcting behavioural norms. Young people see extracurricular classes as a beneficial factor in reducing intolerance. It is important that young people outside the educational establishment socialise in a

favourable environment and learn acceptable standards of behaviour for society. Getting to know new to different peers in an environment where they share interests promotes understanding of people's diversity, and also improves tolerance for the difference.

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# FUNCTIONS OF PARENTS HOMESCHOOLING THEIR CHILDREN: THE CASE OF LITHUANIA

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**Abstract.** *The origins of homeschooling can be traced back to the ideas of John Holt, an educational theorist and advocate of school reform in the 1970s, who argued that schools created an oppressive emotional environment and that education at schools aimed to make children's achievements meet the standards required of compliant employees. Homeschooling is understood as an independent way of organising a form of individual learning, when the child is educated in a family and community environment using a variety of learning tools and environments. The number of homeschooled children is growing, and more and more parents are becoming interested in this form of education and in the legal aspects of its regulation. This article analyses the case of Lithuania. The aim of the article is to answer the questions of how homeschooling of children is organised and what functions parents perform in homeschooling. The qualitative research approach was chosen to analyse the experiences of parents homeschooling their children and to identify the functions of parents as educators.*

**Keywords:** *educational institution, family, functions, homeschooling, learner.*

## Homeschooling: concept and research relevance

### Literature review

**Introduction.** The article presents the most illustrative results of a broader empirical study carried out in Lithuania in 2021–2022. The aim is to answer the question of what the functions of parents are and how the child's education is organised in the case of homeschooling. The research data were collected using a semi-structured interview method and were processed using content analysis. The data were analysed under the topic "Functions of parents homeschooling their children". The topic combines the following seven sub-topics: planning and organising the educational process, selecting/developing educational content, designing learning environments, ensuring a safe learning environment, recording learning achievements, assessing learning achievements, and ensuring socialisation. The research involved ten informants (five parents homeschooling their children and five heads of educational institutions) selected by criterion sampling.

**Concept and ideology.** Homeschooling is defined as the education of the child in a family and community environment rather than at school. Homeschooling is carried out when, at the request of the child and his/her parents (guardians, carers), education within the framework of the general curricula of pre-primary, primary, basic, and secondary education is organised in a home environment. In this case, the parents (guardians) are fully responsible for the education process and its quality. Research articles on homeschooling cite parents' desire to provide their children with values-based education that will prepare them for the future as a key reason for choosing homeschooling. Parents express the view that formal educational institutions focus on the achievements of the learner and consider the preparation of the learner to pass the exams as an essential task (Apriliana, Icmi, and Suryono, 2019). The ideology and practice of homeschooling is spreading so rapidly because the school often becomes a controlling bureaucratic institution, moving away from the essence of education. Meanwhile, parents want their child to be educated in a value-based way, not just for high academic achievement (Lines, 2000). A key issue with respect to homeschooling is how parents perceive their role in their children's education. Parental involvement in a child's formal education includes parental interest in the child's performance, the child's relationship with the school, the teacher, and the surrounding environment as well as the impact of that relationship on the child's personality development (Hill, 2022). Today's school should consider broader opportunities for parental involvement in the educational process and emphasise the indirect links between parental involvement in education and children's developmental outcomes. More collaborative ways should be sought to find a quality relationship with parents (Williams-Johnson, Gonzalez-DeHass, 2022). Parents are important educators of the child who, from the moment the child is born, choose a particular parenting philosophy and ideology, which may not be in line with the values, educational content, and emotional-social environment of the school. This presupposes a conflict, which is one of the reasons why parents choose to homeschool their children and take over the functions of the school.

In the US and Canada, homeschooling has been implemented since the 1970s. Educational theorist and school reformer John Holt began to argue that the official focus of schools on learning created an oppressive emotional environment and that education aimed to match children's achievements to the requirements of the labour market rather than individual needs (Knowles, Marlow, Muchmore, 2015).

**Comparative studies of academic achievement.** Some of the first studies analysing the problems of homeschooling were carried out several decades ago. Rudner (1999) studied the achievements of 20,000 homeschooled children in the US and found that the achievements of homeschooled children were statistically significant, i.e., higher in reading, languages, mathematics, social and natural

sciences, and information technology, when compared to those educated at schools. Ray (2010) conducted a very similar study involving almost 12,000 homeschooled children in the US. The researcher found that homeschooled children had higher levels of achievement in reading, languages, mathematics, social and natural sciences than those educated at school. Martin-Chang, Gould, and Meuse (2011), a team of independent researchers, studied seventy-four Canadian students from different social backgrounds who were homeschooled and educated at school. To assess students' academic achievement, they used standardised assessment tasks employed by Rudner (1999) and Ray (2010) in their studies. One group of subjects was taught using clearly structured teaching/learning methods. The other group consisted of students who were taught using unstructured teaching/learning methods. The data showed that students who were taught using structured educational methods achieved statistically significantly higher results than those who were taught using unstructured educational methods. The methodology of this study was more robust than that of the studies presented above, but the possibility to make generalisations about the academic achievements of homeschooled children was limited by the very small sample size. Belfield (2005) carried out a comparative analysis of the results of the Scholastic Aptitude Test (SAT) taken by homeschoolers and public and private schooled students. The test scores of 330 000 students were analysed, and no statistically significant differences were found between the groups of participants.

**Research and issues.** In his research report, Carlson (2020) presented the problems of homeschooling and the practice of assessing learning achievement. Renzulli, Werum, and Kronberg (2020) highlighted the legal regulation of homeschooling in relation to legislative and judicial trends. Haq, Asbari, Sukriyah, Novitasari, and Abadiyah (2022) explored the relationship of transformational leadership, motivation, and self-efficacy with the context of homeschooling. A significant number of recent research articles have addressed the issue of homeschooling in the context of the COVID-19 pandemic (Petts, Carlson, & Pepin, 2021). Researchers have also been interested in the impact of recommended COVID-19 vaccination and routine testing of children in educational institutions on parents' choice to homeschool their children (Mohanty, Joyce, Delamate, Klein et al. 2020).

**Similarities, disadvantages and reasons for choice.** Kaur (2018) identified the advantages and disadvantages of homeschooling. The author identified the following educational advantages of homeschooling: a curriculum and schedule are planned freely, according to need; the child learns at a pace that suits him/her, and the most appropriate and acceptable teaching/learning methods are chosen for him/her; a safe environment allows the child to express himself/herself more fully; the child gains a wide range of experiences by interacting with a variety of people; family ties are strengthened; there is more

time for interaction within the family, communication is more open; family holidays and outings can be planned more easily; there is a greater opportunity for the child to be exposed to the values that are important to the family; and the child is educated in accordance with the parents' religious and ethical beliefs and philosophy. The following disadvantages of homeschooling were identified by Kaur: usually one of the parents no longer has time to satisfy his/her needs (self-expression, social, cultural); homeschooling is not only time-consuming, but it also requires a lot of financial resources, which can cause financial difficulties for the family; there are situations where the child's socialisation is restricted, and there is a reduction in the amount of shared activities with his/her peers (competitions, school events, etc.); and homeschooling is not well received in society. A study conducted by Kaur in 2018 showed that the reasons behind the decision to homeschool a child can vary widely, from the family's lifestyle, beliefs, and the child's personal qualities to the parents' personal attitudes towards the education system. Some families think that the home environment is more conducive to a child's learning and higher academic achievements in a shorter time. Other parents are concerned about their child's emotional environment and want to provide it; they are frightened by the bullying culture at school. Still other families aim to spend as much time as possible on acquiring the necessary competences, taking into account the child's areas of interest and providing opportunities for more varied and richer learning experiences than at school.

None of the studies presented address the question of the functions of parents in homeschooling. Homeschooling in Lithuania is legally regulated by the Description of Procedure for Implementation of Homeschooling approved by the Resolution of the Government of the Republic of Lithuania (Ministry of Education, art and sport of Lithuania, 2020). In this article, the researchers **set out** to identify the functions of parents in homeschooling by analysing the case of Lithuania. It should be noted that this study is part of a broader qualitative study carried out in 2021–2022.

## **Methodology**

This article presents part of a qualitative study that aimed to identify the functions of parents homeschooling their children. The research sample consisted of ten participants, i.e., five parents who homeschool their children and five heads of educational institutions. The following criteria were applied in selecting the target group of parents: 1) the parents have signed an agreement regarding homeschooling with the educational institution, and at least one child is homeschooled; 2) the parents themselves organise the process of homeschooling. Selection criteria for heads of educational institutions were as follows: 1) the statutes of the educational institution provide for the right to

organise the process of homeschooling and to enter into agreements with parents; 2) the educational institution has signed at least one agreement regarding homeschooling with parents, and its lists include students who are homeschooled. In the course of empirical study, the ethical principles of respect for personal privacy, confidentiality and anonymity, benevolence and non-maleficence, and justice were observed. Data were collected using semi-structured interviews. The following questions were formulated for the informants in the target group of parents: *How is the educational process organised in your family? What does your day look like when your children are involved in learning? What are the functions of parents in homeschooling?* The questions phrased for the informants in the target group of the heads of educational institutions were as follows: *What functions does an educational institution perform when parents choose homeschooling? What functions do you think parents perform when they choose to homeschool their children?* All the interviews were conducted remotely using the Teams platform. The informants agreed to be recorded. The interviews lasted a total of 640 minutes and were transcribed into 182 pages of text (landscape page orientation, Times New Roman 12 pt font).

The data provided by the informants are confidential, so codings have been used to summarise and analyse the data. The data of the informants of the target group of parents have been encoded in the following way: P1, P2, P3, P4, P5. Data codes for the target group of heads of educational institutions have been as follows: EI1, EI2, EI3, EI4, EI5. The qualitative research software package MAXQDA 2022 Setup, MAXQDA Analytics Pro 2022 (Release 22.0.1.) was used for data abstraction. Only the plain text capturing the language of the informant was abstracted. The functions in the MAXQDA program, after abstracting the data, construct coding systems for each informant and provide relationship matrices for the coded data (Figure 1). The code systems of the data provided by the heads of the educational institutions made it possible to identify that the greatest attention was paid to issues related to the responsibility, emerging parental functions, and threats in the context of homeschooling. After abstracting the data of the target group of parents, the coding system made it possible to identify that the focus of the interviews was on discussing the parental functions taken over from education. The abstracted data made it possible to identify key sub-topics.



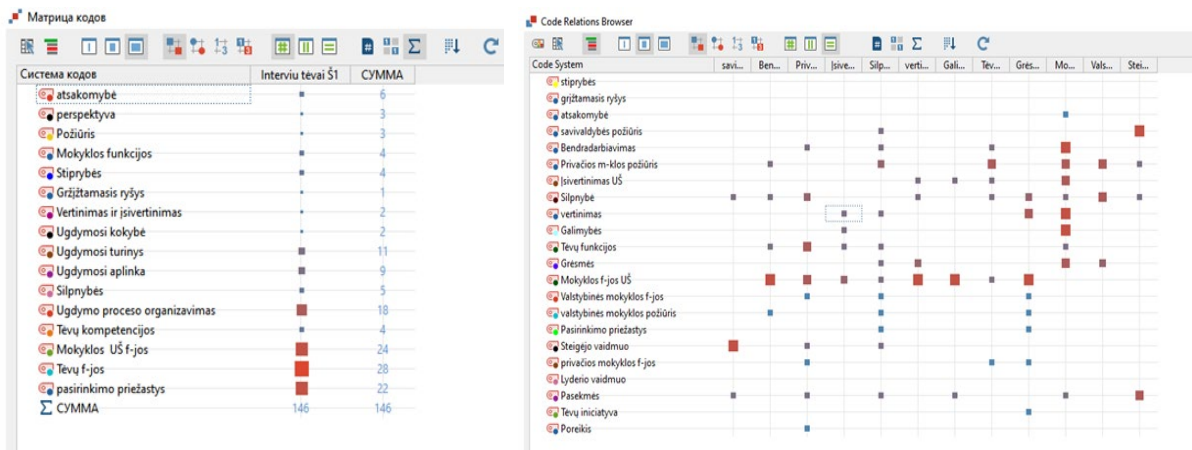


Figure 1 Examples of informant code systems and code relationship matrices (made by authors)

Codes in English (example no 1): Responsibility; Perspective; Approach; School functions; Strengths; Feedback; Assessment and self-assessment; Quality of education; Content of education; Environment of education; Weaknesses; Organisation of educational process; Parental competences; School functions in HSing; Parental functions; Reasons for choice.

Codes in English (example no 2): Strengths; Feedback; Responsibility; Municipal approach; Cooperation; Private school approach; Self-assessment in HSing; Weakness; Assessment; Opportunities; Parental functions; Threats; Functions of EIs in HSing; Public school functions; Public school approach; Reasons for choice; Role of the founder; Private school functions; Role of the leader; Consequences; Parental initiative; Need.

A content conceptual and rational analysis of the data (Parveen, Showkat, 2017) was carried out, focusing on the interpretation of the data, which led to the identification of the most relevant aspects related to the functions of homeschooling.

## Research results

This subsection presents only the most illustrative examples selected from a large database of the research data. The **topic** under analysis is the functions of parents homeschooling their children. The topic combines the following **sub-topics**: *planning and organising the educational process, selecting/ creating educational content, designing learning environments, ensuring a safe learning environment, recording learning achievements, assessing learning achievements, and ensuring socialisation.*

**Planning and organising the educational process.** When homeschooling their children, parents focus mostly on the children’s needs. They involve their children in the organisation of the educational process, thus fostering independence and a sense of responsibility. An informant notes, “I ask the child what we are going to start with, mathematics or Lithuanian, as we still have to do both; it is important because the child feels that he is in charge” (P1); “The other day, he wanted to play the piano, so he sat down and learned

how to play the piano for four hours using the app” (P2). The parents point out that homeschooling also “requires certain competences, self-control, self-discipline” (P4) from the child, but often “the child does not need to be told where to do what as he/she manages everything by himself/herself, and he/she creates, creates, creates...” (P5). It is noted that “the children do a lot of independent work; they do as much as they can; and what they have not done or could not do, we do in the evening after work” (P1). For parents, it is important that the child becomes “sufficiently aware and organised, independent, and able to find information and study independently according to his/her age and abilities” (P3).

In homeschooling, schedules are drawn up on different principle than in the formal education system. “Our days of the week are actually very different: we have a schedule of what we have to do during the week. There is a minimum plan: every day, the children have to do reading, writing, and mathematics; before the music lesson, they have to play; the other lesson, in addition to the three main ones, is, for example, English; it is not like school when you have to get up at eight and have breakfast at eight fifteen. Our days are different: you wake up and see that the weather is nice, so we can go for a bike ride...” (P2). The educational process is not about the number of lessons or a strict schedule, but about the acquisition of new knowledge and the development of skills and competences. When the child decides what, how, and when to learn, he/she takes responsibility for the educational process, while parents become assistants and mentors, and the child’s needs are taken into account when organising the educational process. One of the parents in the study says, “I wake up my children at around 8 o’clock, without much hurry” (P1). Another parent remarks, “It is better if he is in a good mood; I will give him the information in fifteen minutes instead of two hours; we will talk and we will watch a film on the subject. We can organise extracurricular activities in the morning, not necessarily in the evening; it is important that you do not damage the child's immune system every morning” (P2). For parents, it is important “to give their children as much attention as they want and to learn more deeply” (P4); also “that their children are interested and that they are self-motivated to learn” (P5).

The head of the educational institution states that “when a family chooses homeschooling, they study with the child at a certain time, maybe in the evening, or at a different time, when they find the time, or arrange the schedule in a different way” (EI4). It is noted that “children do not learn like they do at school, i.e., for forty-five minutes. They learn at their own pace...maybe they spend two hours on the Lithuanian language, maybe five hours, or maybe they study only the Lithuanian language for a whole week because it is interesting for the child” (EI5).

The educational process is organised in different environments. One parent says that “sometimes we go on an educational trip for a whole day, and on the way back, we go somewhere else” (P2); it is also noted that “there are facilities in the community, and weekly schedules are drawn up depending on subjects that should be taught additionally. The children meet, learn mathematics, English, ceramics, art, etc.” (P1).

**Selecting/creating educational content.** The child’s education consists of many components, and one of them is the content of the education chosen by the parents, when most often teaching/learning is not from textbooks. The informant states that “children initiate what they are interested in; they want to find out things that are important to them; sometimes you do not even know what will interest them” (P1). Another informant notes that “today we had an art lesson for maybe three hours, we watched knitting lessons on YouTube about yarn and about knitting needles; another child also joined in...the children started to measure the hats, how many hats can fit on the hat, what is the weight of the hats” (P2). Parents emphasise the following aspect that is important to them: “We are trying to nurture those things that we see are working and that might be viable” (P4).

Some parents who homeschool their children do not choose the teaching/learning materials used in educational institutions: “We do not have any textbooks. In terms of learning styles, we are complete ‘anti-schoolers’” (P5). The educational content is individualised and personalised, i.e., tailored to the child’s personal needs, taking into account his/her achievements. Often, families use unstructured learning, where the content is shaped exclusively according to the child’s needs, i.e., considering what is interesting to him/her at the time, delving into everyday situations and learning from them. A key factor in unstructured learning is the child’s motivation: “It is important not to force him to do things that are not his cup of tea, but to let him himself be interested and delve into things that really interests him. Yes, the basic things – reading, writing and numeracy – are important. ...He knows a lot, but not because someone has told him to, but because he is very curious and has found the information himself” (P5). The parents’ opinions on General Education Programmes (GEPs) differ. For some, “the GEPs are like guidelines” (P2), while others state that they have “not even looked at GEPs because I find it totally uninteresting; the content of education is dictated by children’s needs in everyday life” (P5).

The heads of educational institutions raise the relevant question of whether “they will be able to apply special methodologies to a child with, for example, an autism spectrum disorder, to achieve the quality of education” (EI2).

**Designing educational environments.** When homeschooling their child, parents take over another function from the school: the creation, selection, and

adaptation of educational environments. Parents must provide a suitable environment for education at home, which must include space for the child's learning. The learning environment for homeschoolers is different from that for those in educational institutions because it is easier to adapt it to the needs of one child or more children. Learning environments are very diverse and are chosen according to the content of education and vice versa. One parent points out, "We went to the manor, and that day we had education about mushrooms. On the same day, we participated in education about flax. Then it was open farm day" (P3). It is important that children are given freedom to choose their educational environments and to decide for themselves where they will learn. "We have basically given the child the opportunity to choose where he will study because he is already old enough to be able to evaluate his own experiences related to how he feels in certain places, and what he would like most of all, and we give him the opportunity to take part in the decision-making process" (P4). "We have deliberately set aside one day (we study four days a week) for educational activities and meetings; almost all day long we are among people" (P2). The head of the educational institution states that "the parents provide us with a description of the child's place of residence; we have the right to go there before the child is admitted; we have the right to receive and believe the documents sent to us and what they say: about the child's place of work and conditions at home"; then, the head adds, "I know that they went to a farm to make candles, that they go to each other's homes to study together, and that they take the child to the library or somewhere else" (EI1).

**Ensuring a safe environment.** A safe environment is one of the prerequisites for parents to homeschool their children. This is also noted by the informants: "The most important thing is for the child to be safe. The most important thing is for him/her to be in a safe environment, where there is no alcohol, no violence, no harmful conditions, and where he/she could feel psychologically and physiologically safe" (EI5). Parents must obtain a safe environment certificate from the municipal administration, which cooperates with the police of the Republic of Lithuania and the Children's Rights Protection Service of the Republic of Lithuania. The head of the educational institution, who participated in the study, notes that "the commission established by the school has the right to come to the family's living environment and assess it" (EI1). However, there is no legal obligation for parents to choose the school of their place of residence when choosing to homeschool their children. When the child is homeschooled, parents can choose any school in Lithuania that has the right to sign an agreement with them. The school may be in another municipality, so it would be difficult to come frequently to observe the educational environment.

**Recording the learning process and learning achievement.** Parents are obliged to keep a record of their child's learning in an electronic diary. The

interviews revealed that none of the electronic diaries installed in Lithuanian schools is adapted to homeschooling. The head of the educational institution observes that “there has been a misunderstanding with the diary: parents are obliged to make records about education every 2 weeks, and they have to follow the curriculum for all subjects. But no one knows how to fill it in. The electronic diary has not been prepared for homeschooling for the second year” (EI1). Parents do not have access to the diary unless the school assigns them the role of the teacher, and they fill in the register as the child’s teachers but not as their parents. One of the school leaders who took part in the study says, “If the Children’s Rights Protection Service issues a certificate confirming that everything is fine with the family and that the children can be homeschooled, why do the parents have to record something in the diary? After all, it is clear that the child is being educated. I do not see any point in doing this” (EI5). The school leader looks empathetically at the situation in which parents find themselves: “When it comes to recording the content of education, I suspect that parents would do it under duress. A copy-paste can be done from the general education programme to show that this week we have taken this or that topic. But is this really happening?” (EI5).

Parents question whether this function assigned to them is really appropriate: “I can fill it all in nicely, but it will not be the truth; I can fill it in as it is, but it will not be the perfect diary, the perfect activities, the perfect learning. Which is better?” (P1). Another informant argues that this is a completely unnecessary function and that they are not required to keep a diary by the school where they have signed an agreement regarding homeschooling: “I do not keep any diaries. I keep notes for myself, but also just because I know I will have to make an annual report” (P5). Some of the parents in the study point out that it can be a great way of self-monitoring: “For me personally, for example, it is not difficult; I sit down for fifteen minutes in a couple of weeks to review everything. It is like self-monitoring of what we have learnt, and, in my case, this self-discipline is even good for me” (P2).

While the recording of educational content is not a complicated process and parents do not object to it, the function of filling in the electronic diary is not parent friendly. The data of the heads of the educational institutions suggest that the electronic diaries do not include a function that allows parents to properly record the content of education; there is no discussion of what a particular school would benefit from seeing: the activities the children have been involved in and the new things they have learnt or discovered, or what they are learning as part of their curriculum. Schools have their own solutions to the situation: some ask parents to send all the necessary data to the responsible school staff member; others create accounts on alternative platforms, where parents upload all the information the school needs.

**Assessment of learning achievement.** Although there is no provision for parents to assess their children's achievements themselves (this function is performed by educational institutions), the interviews have revealed that parents do use some assessment tools to assess achievements of their homeschooled children. "At the end of the month, we self-assess ourselves; the children have taken the tests without school stress" (P1). Another parent points out that "when I sit next to my child, I can see very well what he knows, what he does not know, where he is stuck or where he is weak...and for me, the tests were a very good indicator; I gave my child forty five minutes, and I said, 'Now you do what you think is right and what you can do'" (P2). Children are also encouraged to self-assess themselves. "At the end of the year, we take the notebook from September and discuss: 'Look, you did not even know how to write any letters; see how you are able to write them now?', or when it comes to mathematics: 'Look, you had difficulty in calculating two multiplied by two; now do you see what numbers you are multiplying?'" (P2). "We take part in all the virtual competitions for students: "Olympis", "King", "Kangaroo", and others... It is also a kind of extra stimulus for us, and we can compare ourselves with others to see if our performance has not gone down" (P4).

Almost all of the informants in the study noted that they use some form of assessment of their child's achievements. The child is always involved in this process, discussing his/her progress and identifying gaps. The (self-)assessment process is organised in a different way than at school, and every effort is made to avoid any tension and stress. This is just a way to measure achievement. It can be assumed that the tools and process used by parents to assess achievement are not only intended to test knowledge, but also for parents to assess their performance as educators.

**Ensuring socialisation.** One of the most sensitive issues in the context of homeschooling, which is especially raised by the heads of educational institutions, is ensuring the socialisation of the child. The informant's comment that when homeschooling a child, "the biggest problem is to ensure his/her socialisation" (EI2). Another notes, "I always have a problem with the child's social relations and communication. The child is separated from peers; ties are broken; and no new friendships are formed" (EI4). Thus, the school leaders highlight the problem of the full-fledged socialisation of students.

The informants of the target group of parents have a wide range of opinions about socialisation opportunities at school and in the family. "Real interaction with people, especially if the child is more introverted, is not guaranteed at all at school" (P2). According to the parents, being among a lot of people does not in itself constitute a socialisation process and does not guarantee the quality of communication, which is very important for parents. The parents give many examples of how homeschooled children socialise: "Of course, there are other activities, such as therapies and extracurricular

activities, that they take part in” (P3); “These days, as long as the weather is good, you can socialise as much as you want, but I do not have that much time to participate everywhere because I work. Families meet once a week; adults complain to each other and drink tea together; children play together” (P1); “For me, the biggest, the most basic socialisation takes place in the family...there are a lot of situations in life; you need to help someone; you need to fulfil some duties and balance them with pleasure...” (P2). Homeschooled children have their socialisation needs met in extracurricular activities of non-formal education, chosen by children according to their needs. Since parents have the freedom to plan their homeschooled children’s schedule, these children have more opportunities than those who attend school: “For example, my child is taking courses because he is good at all computer programs; he also enjoys drawing very much, and we naturally devote more hours and resources to it” (P3). Importantly, a homeschooled child can take part in a wide range of educational activities without the constraints of school hours. “No matter what kind of events take place, whether festivals, fairs, or educational events, we always go to them” (P4). The issue of socialisation is not a problem for parents because families that homeschool their children also communicate a lot with each other and have various meetings. It is noted that the general attitude of the group of parents-informants is that the child can socialise as much as he/she needs, not under compulsion but through a wide range of activities and relationships with peers. It is also important that children have the opportunity to retreat and return to their safe environment according to their individual needs.

### **Conclusions and/or discussion**

1. Homeschooling is understood as an independent way of organising individual learning, when the child is educated in a family and community environment using a variety of learning tools and allowing the child to develop at his/her own pace according to his/her needs and interests. Research has shown that parents are able to homeschool their children and that children may achieve satisfactory learning outcomes as well as receive a full-fledged education if parents devote sufficient attention, time and financial resources.
2. The results of the empirical study show that when parents choose to homeschool their child, they essentially take over the main function of educational institutions to educate the child and become responsible for the entire organisation of the educational process. The child is involved in the planning of the educational process; the individual needs of the child are better taken into account, and the child’s autonomy is encouraged. The curriculum and schedule are flexible, based on the child’s acquired

knowledge, competences, and skills rather than on the number of lessons; educational environments are constantly changing and are usually chosen by the child. Parents who participated in the study have identified difficulties in analysing the documents of the education system and the lack of access to the electronic diary. The heads of educational institutions have expressed doubts about the pedagogical preparation of parents to homeschool their children and to ensure purposeful socialisation. In the group of parents-informants, the opposite has been noted: the parents have pointed out that it is possible to ensure successful and purposeful socialisation when homeschooling the child.

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# THE IMPORTANCE OF THE REALISATION OF THE RIGHT OF THE CHILD TO PARTICIPATE IN CHILDREN'S DAY CARE CENTRES

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**Abstract.** *The aim of the study is to reveal the importance of the realisation of the right of the child to participate in children's day care centres based on the experience of social pedagogues and social workers. Qualitative research was chosen for the study by using the method of semi-structured interview. 11 employees, who work in children's day care centres in different Lithuanian regions, participated in the study.*

*The study revealed the importance of the implementation of the right of the child to participate to the child, employees, the quality of provided socio-educational services and the continuity of the implementation of this right when cooperating with the family of the child successfully. The importance to the child should be associated with the strengthening of his/her dignity, self-esteem, self-confidence, the ensuring of his better well-being and emotional security; the self-realisation of the child, his/her problem solving, communication, cooperation, activity planning and organizational skills improve, the child develops responsibility and autonomy when taking and realising decisions. The importance to employees should be associated with the better knowledge of the child and understanding of his/her situation, satisfaction of his/her needs, the formation of the relationship with the child based on cooperation. The importance to the quality of provided services should be associated with activities, which meet the needs of the child, the guarantee of a favourable socio-educational environment in children's day care centres, the opportunity for the child to influence the planning and organization of activities in children's day care centres. The cooperation with the family of the child guarantees the continuity of the implementation of the right of the child to participate, because parents understand the importance of this right to the well-being of the child and create possibilities for its implementation.*

**Keywords:** *child, day care centres, participation, right.*

## Introduction

The guarantee and protection of the rights of the child require particular attention. The United Nations Convention on the Rights of the Child, which was adopted in 1989, is an important international document regulating the rights of the child, the ratification of which establishes obligations which should be observed by the Member States, including periodic reports to the United Nations Committee on the Rights of the Child on progress achieved when ensuring the

rights of the child in a respective country (Manful & McCrystal, 2010). Therefore, it is no coincidence that, both in political and scientific and public discourse, particular attention has recently been focused on the protection of the rights of the child and effective implementation of the Convention on the Rights of the Child (United Nations, 1989). Lithuania ratified the Convention in 1995 and committed itself to guarantee the rights outlined in the Convention for every child.

One of the rights of the child is his/her right to participate in decision-making. The right of the child to participate in decision-making is enshrined in Article 12 of the United Nations Convention on the Rights of the Child (United Nations, 1989), which points out that the child must be guaranteed the right to express his/her opinion and participate in decision-making when discussing issues related to him.

The essence of the right to participation is that every child has his/her opinion and can express it on issues related to them. M. Henagham notes that children must be given an opportunity to be heard in any processes affecting them and that each child would have an opportunity to choose an as high as possible level of participation corresponding to his/her possibilities (Henagham, 2017). The children's right to participation is unique, because it recognises that, although children are dependent on their parents and other adults, however, they have a right to be respected as persons, who have also right to participate when taking decisions, which are pertinent to them (Lansdown, Jimerson, & Shahroozi, 2014). In realising the child's right to participate it is important to interpret children's participation without thinking about children's participation as something other than the participation of all others (Skauge, Storhaug, & Marthinsen, 2021). The implementation of the child's right to participation must become a usual practice in everyday life and various environment and not only in episodic or special events, one-off projects. The effectiveness of the child's right to participation is conditional on whether the adults are guided by the philosophy that the child's voice is important and look for means how to facilitate children's involvement in the participation process, their independent voice, whether a situation is really in the child's interests (Olsen, 2022). Children's participation is a multidimensional process and covers various aspects of the decision-making process: children must be seen, informed, heard and involved in decision-making (Woodman, Roche, & Morag, 2023).

The studies that have been carried out (Bessell, 2011; Vis, Strandbu, Holtan, & Thomas, 2012; Olsen, 2022) demonstrate that an opportunity, which is given to children to participate in processes, which pertain to their well-being, develop their self-esteem, self-confidence, and independence skills. Children's participation in decision-making processes increases their self-confidence, enhances their dignity and the sense of self-esteem, affects their mental well-being, and an overall sense of security. In addition, the appreciation of the child's opinion and the taking of it into account when taking decisions and the

encouragement of the child to take decisions independently increase his/her ability to cope with arising difficulties in the future.

One of the environments in which conditions for children's participation should be created is children's day care centres (further in the text - CDC). Children's day care centres are most often attended by children from families experiencing social risk factors, in which children's rights are often not guaranteed, including the right to participation. The purpose of children's day care centres is to organise children's busyness after their school, develop the social and life skills of a child and his/her family members, as well as implement children's rights (Gudžinskienė, Raudeliūnaitė, Uscila, 2016). Therefore, one of the functions of the employees working in CDC is the implementation of the children's right to participation. Having performed the analysis of studies analysing the activity of day cares centres in Lithuania, it was established that there is a lack of studies revealing the realisation of the children's right to participation in CDC. Therefore, it is appropriate to research the practical experiences of the realisation of the children's right to participation in CDC. The purpose of the study is to reveal the importance of the implementation of the child's right to participation in CDC based on the experiences of social pedagogues and social workers.

### **Research methodology**

**Method of data collection.** In order to reveal the realities of the realisation of children's right of participation at CDC a qualitative study was chosen. The study was conducted by using the method of a semi-structured interview, which enables to move closer to the perception of human experiences, the identification of meanings, the definition of situations and the interpretation of reality (Creswell, 2014). In order to reveal the realities of the realisation of children's right of participation at CDC, during the interview, the social pedagogues and social workers were asked: How is the importance of the implementation of the child's right to participation expressed in CDC?

**The sample of the research.** Targeted selection of the study participants was used in the study. The participants of the study were selected according to the following criteria: 1) social pedagogues and social workers who work at CDC, 2) at least 3 years of work experience at CDC. The study was conducted in the February-March of 2023. All the interviews were conducted face-to-face while recording interviews at the same time. 11 employees, who work in CDCs in different Lithuanian regions, participated in the study. Collection of the research data was stopped in compliance with the data saturation principle. When it was noticed that the answers obtained during interviews started repeating the earlier received data, the new research participants were not included in the research.

**Method of data processing.** The obtained data were analysed by using the content analysis method. According to Creswell (2014), a content analysis is a technique, which, having examined the specificity of a text, allows to draw reliable conclusions objectively and systematically. When performing a qualitative content analysis this consistency was adhered to: multiple reading of the transcribed interview texts and reflection on them, data encoding while singling out semantic units in the text, grouping codes into subcategories, formation of categories from subcategories, integration of categories/subcategories into the context of the phenomenon under analysis, the interpretation of study data (Creswell, 2014). Creswell (2014) emphasises that content analysis is a valid method for making specific inferences from the analysed text.

The study data were analysed by the two researchers. According to V. Žydžiūnaitė and S. Sabaliauskas (2017), if only one researcher analyses the findings, it is difficult to ensure the validity and reliability of the results. Before beginning to analyse the data, the researchers agreed regarding the data analysis. The initial data analysis was performed by the researchers separately by coding the data and forming initial subcategories and categories. After that, the researchers compared initial subcategories and categories, discussed and completed their formation by consensus.

**Ethics of the research.** The study was based on the respect for personal privacy, benevolence and attitude not to harm a research participant, confidentiality and anonymity (Aluwihare-Samaranayake, 2012). The participants of the study participated voluntarily. They were briefed on the purpose and the use of the study, the method of study data collection and the procedure of the study, anonymity and confidentiality were ensured. Study participants were assigned a code by using the letter 'A, B, C' and so on.

## **Research results**

The study highlighted the importance of the right to participation to a child, employees, the quality of the provided socio-educational services and the continuity of the implementation of this right to participation in a successful cooperation with the child's family (Table 1).

**Table 1 Expression of the importance of the implementation of the child's right to participation in CDC (Raudeliūnaitė & Gudžinskienė)**

Categories	Subcategories
Importance for a child	Strengthens child's dignity
	Strengthens the child's self-esteem and self-confidence
	Ensures a better child's self-feeling, his/her emotional safety
	Assists a child in realising himself
	Contributes to the development of his/her problem-solving skills
	Strengthens his/her communication and cooperation skills
	Develops his/her responsibility
	Learns activity planning and organising
	Develops independence when taking and realising his/her decisions
Importance for an employee	Gets get to know a child better and understands his/her situation
	Can respond to the child's needs better
	Forms the relationships with a child based on cooperation
Importance for the quality of the provided socio-educational services	Activities respond to the child's needs
	Child's participation guarantees a favourable socio-educational environment in CDC
	Children can exert influence on the planning and organising of activities in CDC
Cooperation with child's family ensures the continuity of the implementation of the child's right to participation	Parents understand better the importance of the child's right to participation to the child's well-being
	Parents create conditions to implement the child's right to participation in daily life

The results of the study demonstrate that the employees of CDC recognise the importance of the child's right to participation. On the one hand, child involvement in decision-making process strengthens the child's dignity, his/her self-esteem, self-confidence, guarantees a better self-feeling of a child and provides a sense of security. On the other hand, child participation creates conditions for a child to realise himself, contributes to the development of his/her problem-solving, communication and cooperation, activity planning and organisational skills. In addition, a child develops responsibility and independence when taking and realising his/her decisions. This is illustrated by the following statements of the study participants: "when the adults demonstrate that the child's opinion is important, when his/her opinion is not only asked for, but also taken into account while taking decisions, a child feels important and, in the long run, begins to trust himself/herself more, express his/her opinion, he/she discusses" (G), "when we ask children for their opinion, encourage to speak it up,

then it brings security to children, they feel significant...” (J), „when children notice that their opinion is listened to, they open up more and express their needs, whereas we as employees can create conditions for their self-realisation, for example, to organise activities, in which children can unfold their potential” (D), “in discussions children develop their communication, cooperation, and problem-solving skills” (A), “by getting involved in the planning and organising of various activities in CDC children develop responsibility, their planning, organisational, and self-regulation skills improve” (F). Consequently, the study highlighted multifaceted benefits of the right to participation for a child. Other authors also emphasise the importance of participation for the child’s dignity and self-esteem (Bessell, 2011), self-confidence, and self-respect (Saracostti, Caro, Grau, Kinkead, & Vatter, 2015). Children, who are more involved in decision-making, evaluate themselves better, their social skills improve, their respect for another person increases (Lansdown, Jimerson, & Shahroozi, 2014). Children’s participation when taking decisions not only contributes to the development of their personal and social skills, but reduces the level of their stress and anxiety, and increases interest in their life as well (Vis, Strandbu, Holtan, & Thomas, 2011). The participation of children allows for the formation of critical thinking, and the improvement of decision-making skills, which children will be able to use in the future (O’Hare, Santin, Winter, & McGuinness, 2016).

The study demonstrates that the employees of CDC identify the benefit of the realisation of the child’s right to participation for themselves as well: they get to know a child better and understand his/her situation, are able to respond to the child’s needs better, furthermore, the relationships with a child form on the basis of cooperation. According to the study participants, “when you hear the child’s opinion, his/her arguments, you understand better why that child thinks so and acts so” (B), “when the children say what they want we’re able to understand their needs better, perceive what a child wants” (I), “by listening to children and showing attention to them, responding their needs, supporting the child, better relationships with children, which are based on trust, form” (C). S. Palmer, S. Maiter, and S. Manji also underline the importance of the relationship between an employee and a child and point out that a good relationship guarantees positive changes (Palmer, Maiter, & Manji, 2006). Furthermore, A. J. Hurd (2011) points out that the realisation of the children’s right to participation deepens the knowledge and understanding on children’s rights.

The results of the study demonstrate that the realisation of the child’s right to participation in CDC conditions the quality of the provided socio-educational services due to the fact that activities respond to the child’s needs, child participation guarantees a favourable socio-educational environment in CDC and children can exert influence on the planning and organizing of the activities of CDC. The study participants noted that “by allowing the children to give voice, responding to their interests, permitting them to organise activities according to

their preferences and suggestions, appreciating the child's opinion, we improve the microclimate inside the day care centre and the quality of services itself" (K), "when listening to children there's a feeling that services respond to their expectations, whereas that is related to the quality of services" (J). Other authors also agree that the child's involvement in decision-making is a necessary condition to achieve the quality of social services (Brummelaar, Harder, Kalverboer, Post, & Knorth, 2018; Heimer, Näsman, & Palme, 2018). By creating conditions for a child to participate in decision-making, the provided socio-educational services are more in line with the needs of the child (Heimer, Näsman, & Palme, 2018). J. Aldgate and J. Stratham point out that the realisation of the children's right to participation creates preconditions to achieve the effectiveness of services (Aldgate & Stratham, 2001).

Attention should be drawn to the fact that the continuity of the implementation of child's right to participation can be guaranteed when cooperating with the child's family. When the employees of CDC cooperate with the child's family parents understand better the importance of the child's right to participation for the well-being of the child and create conditions to implement the child's right to participation in a domestic environment, in daily life. This is illustrated by the following statements of the study participants: "it is often difficult for parents to acknowledge the importance of the child's opinion, involve him in decision-making, however, when we talk with parents they listen to our statements and arguments and it happens that the situation takes a turn for the better" (D), "few, but there are some parents who understand that it is important that a child takes decisions independently, that, in his/her family, they must learn to do that...by sharing their experiences, they help us and inspire other parents" (G). Hence, the data of the study demonstrate that it is not sufficient to create conditions for the child's right to participation to be expressed only in CDC, it is important to cooperate with the family and endeavour that, in a family environment, the child's right to participation would be recognised and favourable conditions would be create for its realisation, because otherwise the continuity of the right to participation will not be guaranteed. K. Herbots and J. Put point out differences in approach among the adults and its fragmentation, and the lack of their cooperation as significant barriers to the realisation of the child's right to participation (Herbots & Put, 2015).

## **Conclusions**

The study established the importance of the realisation of the right to participation for a child, employees, the quality of the provided socio-educational services and the continuity of the implementation of the right to participation when cooperating with the child's family.



The child's involvement in the realisation of his/her right to participation strengthens his/her dignity, self-esteem, self-confidence; his/her self-feeling and self-realisation improve. In addition, a child develops problem-solving, communication and cooperation, activity planning and organisational skills, responsibility and independence when taking and realising his/her decisions.

The realisation of the right to participation is useful to the employees of CDC as well, because they get to know a child and his/her situation better, and can respond better to the child's needs, the relationship with a child, which is based on cooperation, is created.

The realisation of the right to participation is also important for the quality of socio-educational services provided in CDC, because, when implementing it activities respond to children's needs, children have an opportunity to exert influence on the planning and organisation of the activities of CDC, a favourable socio-educational environment is created in CDC.

The study highlighted that the cooperation with the child's family ensures the continuity of the implementation of the child's right to participation in a family environment, because parents understand better the importance of this right for the child's well-being and search for various opportunities to involve their child in the participation process.

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# ALGORITHM FOR ENSURING AND IMPLEMENTING SOCIAL PROJECTS IN THE CONTEXT OF GLOBALISATION (COMPARATIVE ASPECT)

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***Abstract.** In the practice of Ukrainian public institutions today, there is a significant presence of financial support from international funds to ensure the implementation of social projects. This topic in the education sector also has its roots and peculiarities of use at different levels of educational services.*

*And one of the most pressing issues in our practice of implementing socially significant projects on the basis of higher education institutions and within the framework of NGOs was the issue of a phased algorithm for implementing such projects.*

*Therefore, in this scientific review, we have considered the importance and significance of social projects in the public and public sector on the example of Ukraine and EU countries; compared the main directions of international and Ukrainian social projects analysed the issues of financial support for relevant project activities.*

*This analysis allowed us to present the main algorithms of interaction between public funds, business and the community at the national and international level, as well as to develop an algorithm for ensuring social projects for their further implementation in the context of global access to information and grant support at all levels.*

***Keywords:** grant support, international projects, project activities, social work.*

## Introduction

Since Ukraine's independence, the scientific community has had a tradition of supporting national-level research projects and international cooperation, generally implemented at the level of post-Soviet states. However, the available information space and globalisation processes (which our country has been involved in since the 1990s) have created the preconditions for expanding opportunities for financial support and developing low-demand topics. In particular, their low potential for the public funding sector.

At the same time, international organisations and foundations have provided Ukrainian scientists access to a wide range of high-quality information portals on scientific innovations, developments and research (open and partially open access) to expand the range of topics and areas of funding. This process of engagement continued and had a sharp surge in 2019 after the opening of ResearchGate, Mendeley, Elsevier, Clarivate and other scientific portals for all Ukrainian scientists, affecting the humanities, which had not had such an

opportunity before. This has led to an increased interest of the Ukrainian scientific community in issues that have already been developed in the world and have proven to be effective for economic, social and cultural growth. This also applied to social and pedagogical innovations that had a direct impact on all areas of life.

In addition, in our opinion, an important step towards increasing the scientific and research potential of the Ukrainian community was the gradual involvement of government and NGOs in the processes of grant support, crowdfunding, and the development of their own projects that are important for a particular territorial community.

However, we are most interested in the inclusion of an appropriate strategy for preparing the younger generation to implement socially significant projects, develop and implement them, develop the skills necessary to work in a team (including an international team), create relevant concepts and consolidate the personal values of the person involved in the project, Ukrainian and international values and goals. In particular, the Millennium Development Goals, which have a significant impact on the formation of educational policy followed by the international community.

This allowed us to define the main goal of our research, which is to refine the algorithm for ensuring and implementing social projects in the context of globalisation (since we have described the algorithm in previous publications)

## **Literature review**

We were able to analyse the digitised materials of the Ukrainian community on research funding and international financial support for science, and the availability of this information and statistics abroad, in particular, on the example of the European Union. In particular, we noted that basic information can be found in the public domain in the Ukrainian community since 2013, but it is only tangential to our main request for information on existing projects and research (NBUV, 2024). Also, partial information on state support and funding can be found on the portal of the Ministry of Education and Science of Ukraine (MON, 2024) starting from 1999, but most of the projects supported according to this project database are in the hard sciences and do not have critical social significance in the areas of our scientific review.

At the same time, the entire database of projects supported and implemented with EU funds and in cooperation with developing countries since 1991 (the period of interest to us) and earlier (European data, 2024) is freely available to anyone who speaks English or has basic skills in using technological solutions for translating information on the Internet. In addition, we present a qualitative analysis of statistical data on the number of studies by industry in comparison with previous years of research. Of course, there are reasons for this, and the main

one is the structured approach and openness of financial data, as well as the results of each project.

According to reports and analytical articles on the European Union's (EU) *involvement in research and development, the historical background shows that such activities began in the 1970s with the adoption of the first Community Research Programmes by the Council. The programmes were low-budget and adopted individually by the Council without a strategic approach. Later, at the suggestion of the European Commission, this process was put into a systematic direction with the help of Framework Programmes (FPs), which acted as a strategic tool for programming and funding research* (Arias-Navarro, et al., 2023). Today, the ninth Framework Programme Horizon Europe is in place, which aims to overcome social problems that have become a challenge for each country individually and for the world as a whole. According to scientists, *this will require transdisciplinary cooperation, dialogue between scientists and various stakeholders, and the involvement of citizens in research activities related to major societal challenges* (Arias-Navarro, et al., 2023).

For example, thanks to researchers who highlight the results of analytical activities in a particular area of research, we are able to open additional slots for research in education, social work and personality psychology. In particular, thanks to such studies and findings, we have access to generalised data reflecting the European Union's policy on issues that are important for the implementation and comparison of the significance of social projects in the field of education and training of specialists in the relevant fields.

We have already disclosed the essence of our activities within the framework of social projects and the involvement of future specialists in their implementation (Sarancha, Khilya, 2020). But more on that later.

After all, further analysis of information in the Ukrainian financial environment allows us to review only certain analytical reports for 2016 (Analitychna dovidka, 2016), for the last years 2021 and 2022, as well as on the problems of young scientists in Ukraine and recommendations for their solution (Zhabin, et al., 2018). However, in most cases, such reviews describe the current state of research activities and state the outflow of personnel, while the actual achievements are presented in terms of quantity (number of projects, amount of funding, number of structural units involved, etc.), but the quality and potential of implemented and launched projects are presented little. That is, the critical impact and social significance - cultural, socio-economic value, and their impact on the education sector - are excluded from such an analysis. That is, the issues of social programming fall out of the statistics on the results of project activities, which should directly affect the training of specialists, in particular teachers, psychologists, social workers, who not only have the knowledge and skills to use the results of STI (ICT, research forms of work, etc.) to implement public policy, but also to contribute to the achievement of effective social integration, personal

fulfilment for the well-being and prosperity of each "element" of the state and society (Khilya, et al., 2023). That is why, in our opinion, the qualitative result, which sometimes has to be calculated for the future generation's preparation for scientific and research activities, should be presented and monitored. After all, the way we strategically plan and implement social programming from childhood education to higher education will determine the level of scientific achievements, the quality of project activities and international cooperation in Ukraine without staff outflow.

## **Methodology**

According to the previous research materials and our own experience of implementing educational and socially significant projects, we concluded that the next step to improve the interaction of educational research institutions with NGOs to improve the process of including the training of young professionals in education, social work, and psychology, as well as to introduce cooperation in international project activities, is to compare the features of the development and implementation of such projects in the context of globalisation.

It is on the basis of the data obtained that we will be able to develop and present an algorithm for the provision and implementation of social projects to prepare a socially responsible specialist for social challenges in the context of globalisation. This is the main message of the presented materials on the algorithm for ensuring and implementing social projects.

Below we present the issues step by step:

- globalisation and its importance for social programming of the population and socially responsible behaviour of professionals;
- ensuring quality functioning in the international space (on the example of project activities within the EU)
- the functioning of the project system of Ukraine, on the example of the implementation of relevant projects of our NGO and its cooperation with a pedagogical university.

Such a research algorithm for working with project activities and globalisation processes will allow us to develop a mechanism for ensuring and implementing social projects aimed at training young professionals for scientific, research and creative cooperation to ensure Ukraine's socio-economic and socio-cultural growth in an open international system of funding, monitoring and interaction.

## **Research results**

So, what is the essence of the review we propose?

According to our previous discussion, the first question to be addressed in this area of statistics and information analysis is the issue of globalisation and its impact on project activities in general.

In recent years, *culture has become a means of connecting with economic and political aspects that help to eliminate social and economic inequalities through globalisation* (Hameed, et al., 2021). In addition, *the development and implementation of innovations, especially if they are carried out quickly and regularly, further contribute to the dynamism of the environment and have a direct impact on the structure of education through the transmission of cultural and social values, which reveal to us the issue of globalisation as a matter of "colonisation of values"* (Hameed, et al., 2021). This aspect gives us an opportunity to think about how Ukrainian values, which are presented through project activities, are represented and correlated with the values of the European Union and the Millennium Development Goals. Whether Ukrainian values are competitive in the processes of globalisation, i.e. in the open interaction of the market of ideas, financial markets, the market of public welfare and social response to the challenges of the modern world.

In this regard, we need the Ukrainian education system to adopt a business model that outlines the stages of competitiveness. The first of these *is investment in local resources*, which means supporting national traditions, consciousness, and traditional values of Ukrainian society by funding socially important projects that help Ukrainian society and the scientific community grow and develop. And the second is that, as stated in the business model, *they are reaching a threshold point* and must move to competition in the international space of interaction. Since the education sector does not always follow the issues of competitiveness and often lags behind in innovations for the sake of system stability, each country loses the potential of the younger generation for the exponential development of science and technology and, as a result, the corresponding growth and improvement of the social and economic situation in the country. That is, each lost opportunity to participate and implement projects also affects the welfare and future of the country's citizens. Therefore, *it is suggested that countries should focus on enhancing economic globalisation, which will open their economies to the economic resources, knowledge and skills that are crucial to the transformation process. While few nations also need to focus on opening their doors to social and political globalisation* (Hameed, et al., 2021). Which, in turn, begins with education, learning new skills, developing soft skills, shaping educational policy in accordance with the needs of a competitive society that is ready for global challenges.

In our case, the demonstration of achieving such a global goal is the development and participation in international projects that allow us to study the EU value system and its application in practice to implement socially significant projects, to support the functioning and cooperation between different systems and governments to achieve the fourth Sustainable Development Goal "Education for Peace" and others. In particular, the Module "The Social Integration of Children with Special Needs in an Environment of Diversity and Inclusion: European Approaches" Project: 101085267 - SEEDUE4UA - ERASMUS-JMO-2022-HEI-TCH-RSCH (2022-2025), which we are implementing together with colleagues, aims to improve students' understanding of the EU's system of work for inclusion and diversity in each of the participating countries. Such interaction on the theoretical aspects of integration, inclusion and diversity will, in our opinion, have a qualitative impact on the practical preparation of this part of the student population to write and implement projects taking into account the values of creating an inclusive space, accepting diversity and the need for social inclusion for the sake of partnership.

Knowledge and understanding of the system of support and sustainable development in this area will allow future specialists to prepare projects not only on relevant topics, but also to consciously approach the topic as a scientific interaction for the implementation of values in the practice of a Ukrainian psychologist, teacher, social worker, as well as to use the best practices of Europe, adapt them and combine them with Ukrainian ones to achieve better results for Ukrainian citizens.

However, this is only one of the aspects that globalisation brings to the development of the scientific and practical potential of educational developments and involvement in processes that can ensure Ukraine's competitiveness in the global market without levelling the internal potential.

Further, if we continue in accordance with the points we have identified, it is worth outlining the issue of ensuring high-quality functioning in the international space (on the example of project activities within the EU). Although we have already partially started presenting our experience. We partially revealed the potential for interaction in the international field of socially responsible projects in our previous publication (Sarancha, Khilya, 2020). We presented projects that were implemented with the participation and support of international investment () and directly involved student youth. Today, this practice continues and expands in accordance with the organisation of cooperation between Vinnytsia State Pedagogical University and the Vinnytsia City Organisation for Social Development and Formation of Certain Disadvantaged Youth "Parostok".

As a result of this three-way cooperation, we had a high rate of youth involvement in project activities. But at the same time, this trilateral cooperation has certain legal conflicts, because in the framework of international projects, we currently cooperate with the EU and funds from individual countries either as



representatives of NGOs or as representatives of the university. This complicates the process of attracting students because of the need to legally formalise the next step of interaction either through internships at an NGO or as cooperation within the framework of individual events of the organisation with the university. This causes a number of inconveniences in terms of documentation, but is outweighed by the social effect of involving students in project activities.

As we have previously described, there are a number of factors that will contribute to the *development of students both in practical and spiritual and ethical terms* (Sarancha, Khilya, 2020). In support of these factors, we would also like to provide examples from international research on critical points in the development and implementation of projects for the three-pronged cooperation. Thus, the key role of geographical distance should be taken into account, as the relevant distance in establishing new partnerships is social and endogenous, as it is determined by the evolving social network. It is through the evolution of the social network that geographic distance plays an indirect role in the model. It is believed that geographically closer agents have more opportunities to cooperate, although in reality these opportunities materialise only when their current social distance is short enough (Duernecker, & Vega-Redondo, 2012). It is social distance and geographical distance that can play a negative role in the development of a project. For example, students who are doing an internship but are not internally ready to interact with vulnerable groups of the population, or who have a prejudiced attitude towards certain types of activities, can play a deterrent to the quality of the project. Also, legal issues in the organisation of cooperation can lead to distancing of the parties involved and, finally, the geographical remoteness of the project implementation and management locations can create prerequisites for a *broken phone* that will affect the quality of project activities. After all, communication in projects involving implementing entities from different regions of Ukraine and international partners requires a clear algorithm for the implementation of each stage, step, and activity within the project and high-quality communication, both in terms of time and language skills, and the flexibility of management and the team.

Based on the above, we can note that part of the risks of cooperation are related to the fact that during the project implementation, agents participate in a series of repetitive games of indefinite duration, with cooperation being maintained (at the equilibrium of the underlying population game) by both bilateral and threats of punishment from a third party (Duernecker, & Vega-Redondo, 2012). Regarding the latter point, the key to understanding it may be that not all students involved in the work may be intrinsically motivated. Some students need to be motivated not by the moral satisfaction of a useful social action or by gaining skills important for further professional growth, but only by the number of points for a particular activity that will allow them to complete a

certain cycle of study at the university in accordance with the agreement between the NGO and the university on internships in the field of study.

Of course, we will not dive into the economic component of research, which, in our opinion, significantly affects the distribution of funding, quantitative and qualitative indicators of project results. However, the main point for us in this data analysis is that game models and simulations often repeat the distribution of funds and the availability of grant assistance that we see in the real world. Therefore, it may be worth paying attention to improving the criteria for selecting and engaging partners in the implementation of socially significant projects.

In the process of working with the projects, we also had the opportunity to borrow a qualitative assessment of the project team, partners, etc. that had a significant impact on the project implementation processes, conflicts, comments, and improvements in the implementation of the programmes.

Today, we continue to implement programmes and approaches that ensure cooperation between universities and NGOs in regional and international projects, look for new approaches to motivating and engaging students to participate in ongoing projects, and develop their own projects that will have an economic and social impact on the local community in which they work or study. We draw attention to the above risk factors that may be present in project activities and those identified by the funders directly (Kvam, 2018).

In addition, most researchers and project coordinators agree that there is a need for special training for coordinators and the transfer of some of their powers and responsibilities to team members. After all, a bad coordinator can ruin a project, but a good coordinator should remain invisible. A good project design is essential, i.e. it should lead to a mutually beneficial result for each individual partner (Cunningham, et al., 2020). Thus, referring to the definition of the European Commission, the Project Manager is the initiator of the project submission for expert evaluation and up to its implementation and completion. implementation and completion of the project after receiving the grant (Cunningham, et al., 2020). We must prepare students for such responsibility gradually, step by step, preparing them for active interaction within existing projects, developing the ability to respond flexibly to the situation during the organisation and conduct of activities within projects, putting them at the head of micro groups (teams) for the implementation of a particular stage of the project, etc.

According to our observations, as a result of participating in theoretical projects, students have increased their interest in participating in practice-oriented projects that would allow them to gain experience in direct practice both in Ukrainian government and NGOs and in international cooperation.

In our next article, we will provide a broader overview of the results and qualitative indicators that accompany the implementation of a comprehensive

algorithm of interaction between a higher education institution, an NGO and international partners.

### **Conclusions and/or discussion**

Thus, despite our analysis and practical work on developing an algorithm for ensuring and implementing social projects in the context of globalisation, there are still issues of thematic relevance of projects developed in Ukraine, their competitiveness within the defined framework of international cooperation, and a reorientation from quantitative to qualitative indicators.

An additional lever that needs to be revised is the algorithm for organising three-party cooperation, which includes higher education, NGOs, and the public sector. In the same aspect, we must address the issue of business and its inclusion as a fourth party in the process of long-term restructuring, particularly in education, because training of specialists and involvement of the younger generation in scientific and research activities cannot be separated from the functioning of the education system. Therefore, in our opinion, this set of education plus business measures is only at the beginning of its development.

Of course, critical comments on our proposed algorithm and the issues raised will allow us to reconsider certain aspects of project interaction. But at the same time, we must remember and take into account not only our personal/state experience in this area, but also the fact that each country, each region of the country has historically developed separate schemes for the functioning of scientific communities, the "rules" of cooperation between the public and public sectors, and the social programmes that work are embedded in both social interaction and the behavioural patterns of individual scientists and individuals involved in project activities. It is, of course, impossible to take everything into account, but it is absolutely possible to understand and adapt interaction models.

### **Summary**

Of course, Ukrainian society is not standing still. Despite the difficult military and political situation, Ukrainian citizens are involved in project development, seeking funding on crowdfunding platforms, and startups. Ukraine's scientific community has not yet gone beyond the programmes of international foundations and organisations that are already familiar (Horizon, Erasmus, International Mobility within the EU and America), and is expanding its opportunities through the countries of the East, etc. But so far, humanities researchers (pedagogy, psychology, social sciences) are not represented in co-financing business models, because their qualitative results that would present financial benefits are prolonged in time, i.e. the result can be seen by funders only in a few years, if not decades. However, this may be a subjective assessment that

does not take into account the exponential development that changes in education and social programming can lead to.

That is why the complex process of deriving the best algorithm for the provision and implementation of social projects in the context of globalisation that we have chosen for ourselves combines theoretical aspects of preparation for the perception and awareness of value capital and the practical implementation of the knowledge gained when the same young people are involved in the implementation of existing projects, developing, submitting and implementing their own projects at a university or NGO.

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## PRACTICAL APPLICATION OF INFORMATION TECHNOLOGIES IN SOCIAL WORK STUDIES

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**Abstract.** *Applying flexible and innovative teaching methods allows to improve the content of learning and education, as well as its quality and relevance. Efforts are made to provide as many opportunities for distance learning and virtual mobility as possible by using the benefits provided by new technologies, improving the training process and adapting it to each individual. A case study strategy was chosen, as the study consists of one separate object which is one higher school that implements the Social Work study program. The conducted research is of the "one-time cross-section" type, as it is dedicated for a specific purpose, namely, the modernization of the social work study program. In 2022 - 2023, semi-structured interviews were made with students of the Social Work Program participating in an international project on the application of innovative technologies in social work. The purpose of the research is to reveal aspects of the practical application of information technologies in the process of social work studies. Based on the findings obtained during the interviews and the research presented in the theoretical part about the application of information technologies in the study process, information technologies were divided into three groups of tools: technical tools, digital content creation tools, communication, and collaboration tools. The research found that the following technical tools are used the most and most often during lectures: computer, smartphone, camera, sound speakers, microphone with integrated speaker, Bluetooth headphones, projector, printer, high-speed Internet connection and wireless (wifi) network. It was found that students use text editors, calculators, the tools for video creation, presentation creation, quiz creation and survey assessment programs during lectures. Most often, 3-5 times a week, students use the following means of communication and collaboration: social networks, audio, and video storage, learning environments, laboratories, conferences, chat programs.*

**Keywords:** *information technology, social work, study process.*

### Introduction

The role of higher education institutions is to increase participation in the higher education system by implementing innovations and leveraging new trends

in the use and integration of open educational resources into teaching and learning (Zuhairi, Rokhiyah, & Zuhairi, 2019). Learning, supported by technology, is adapted to enable distance learning by utilizing technology to organize learning, ensure interaction of any type, and carry out other learning-related activities online. This type of learning includes distance, virtual, electronic, mobile learning on social networks, where learning content is delivered in a virtual learning environment, all facilitated through the use of information and communication technologies (Teresevičienė et al., 2015). The application of technical tools in the study process has been addressed in scientific articles by: Brown & Mbatl (2015); Dahlstrom et al. (2015); Al-Emran, Elsherif, & Shaalan (2016); Brooks (2016); Sung, Chang & Liu (2016); Cross, Sharples & Healing (2019); Rokhiyah, Zuhairi, & Zuhairi, (2019); Fox (2019); Bidarra & Sousa (2020); Yıldız et al. (2020). The possibilities of applying digital content creation tools in the study process have been analyzed by: Brown & Mbatl (2015); Rienties et al. (2018); Alessio et al. (2018); Cabı (2018); Rokhiyah, Zuhairi, & Zuhairi, (2019); Walshe & Driver (2019); Rupp et al. (2019); Vettehen et al. (2019); Shadiev, Wang & Huang (2020).

Research has identified the communication and collaboration tools applied and how their usage evolved in the study process: Kaklauskas and Kaklauskienė (2012); Gedvilienė, Kankevičienė, and Balynienė (2012); Trepulė and Daukšienė (2016); Prakapienė and Prakapas (2018); Reinecke et al. (2018); Chang, Shih & Lu (2018); Rokhiyah, Zuhairi & Zuhairi (2019); Bozna & Firat (2019); Ucar & Goksel (2019); Ademi, Loshkovska & Chorbev (2019); Misevičienė, Rimavičius & Makackas (2020).

### **Research methodology and participants**

The research was conducted based on the principles of neo-positivism philosophy, which supports the need for quantitative research to reveal the actions of society or certain social groups (Šupa, 2021). The development of neo-positivist knowledge relies on careful observation and measurements of objective reality (Židžiūnaitė, Sabaliauskas 2017). This approach helps to explore the practical application of information technologies in the process of social work studies. To provide a more comprehensive understanding of the information technologies applied in the study process by social work program students, a case study strategy was chosen. This is because the study comprises a single distinct object – a single university implementing the Social Work Studies program. A qualitative study was conducted using a semi-structured interview method, allowing for the exploration of students' experiences and the identification of real situations in which students apply information technologies in the study process.

## **Practical application of information technologies in the process of social work studies**

Students of the Social Work program utilize laptops during lectures, using them for tasks, projects, finding, organizing, and storing necessary information, as well as connecting to remote lectures or consultations through Zoom and Teams programs. Research participants indicated that they use laptops for note-taking and writing other texts using the Microsoft Word program during lectures. They create files, edit videos, make presentations, view visual materials, and connect to the university's website. Statements illustrating the analysis include: *"I use it for writing various study assignments, taking notes during lectures. I also use programs on the computer that help to work in groups if it is not possible to do the tasks in person"* (N\_1); *"Needed for accumulating information, writing texts, searching for information, attending lectures"* (N-3). Desktop computers are used in information technology lectures and for completing study assignments because it is easier to focus when working with a desktop computer. *"I find it easier to focus and complete study assignments at a desktop than with a laptop. I sit down and write an essay or another written work, and I'm done. With a laptop, I get distracted or can't concentrate"* (N\_9). Desktop computers are also used during assessments to share slides or video materials. The research participants indicated that they use smartphones during lectures to capture information provided by the lecturer during the lecture and information that may be needed in the future for accumulation, summarization, and organization: *"I jot down the essential points mentioned by lecturers on a particular topic"* (N-7), *"To systematize information"* (N\_3). Participants in the study note that they save information by taking photos of slides or other presented information: *"During lectures, I use it when I need to take photos of information"* (N\_5). They also mentioned that they use smartphones during lectures to quickly find necessary information, with one of them citing searching for laws or other documents as an example: *"I connect to Wi-Fi during lectures when I need to find information, such as laws or other documents"* (N-11). Mobile phones are not only used to search for information but also to share it with other students: *"It helps to communicate with classmates, search for information quickly, and also share it, take photos of the necessary information"* (N\_12). The participants in the study indicated that they use smartphones to participate in online lectures, naming Teams and Zoom programs, in order to communicate with lecturers and colleagues. Research participants mentioned that they use smartphones during lectures to perform tasks: *"I use it as an alternative to a computer, prepare tasks, communicate with colleagues, summarize the taught theory"* (N\_7). They use it for time tracking and planning, checking the lecture schedule and email, and browsing social networks. Research participants indicated that they use cameras to join online lectures. One of them noted that turning on the camera helps to

participate more actively in the lecture, but it is easier to absorb knowledge when all students' microphones and cameras are turned off: *"It helps during lectures to participate more actively, communicate. However, it's easier to absorb knowledge when all students'... cameras are turned off (otherwise they somewhat disturb, interfere, distract), and only the lecturer is visible and speaking, slides are presented"* (N\_6). During lectures, they use speakers to watch videos or presentations with sound, to hear what the lecturer allows: *"During assessments, to share slides and video material"*(N\_6), *"To hear what the lecturer allows"* (N\_4), also during online lectures. They used a microphone with an integrated speaker when participating in online lectures: *"when lectures were held remotely"* (N-15), research participants clarified that they used the microphone to answer questions, discuss tasks: *"To answer questions, discuss tasks"* (N\_19). Additionally, research participants noted that the microphone allows for more active participation in online lectures, but it is easier to absorb knowledge when all students' microphones and cameras are turned off: *"...it's easier to absorb knowledge when all students' microphones...are turned off"* (N\_17). During lectures, they use Bluetooth headphones to connect to online lectures: *"During lectures, when lectures are held online"* (N\_11), *"Helps during lectures to focus more on what the lecturer is saying, to isolate from external distractions/sounds"* (N\_14), to listen to the required information or video material without disturbing others: *"When I need to independently find information, I use them so that I can watch video and/or audio recordings on Youtube, etc., without disturbing others"* (N\_12). They use a projector during lectures to see the material presented by the lecturer, slides: *"I use it almost in every lecture because we are taught subjects with slides, which are shown via a projector"* (N\_15). Other research participants indicated that they use the projector to share their slides, video material, and present intermediate tasks: *"To present intermediate tasks, projects"* (N\_7). They use a printer and copier during lectures when they need to print or copy necessary documents or print information related to lecture materials: *"To print necessary documents"* (N\_8). Research participants identified that high-speed internet connection is necessary for completing tasks, working in virtual environments, preparing written assignments, responding to inquiries, participating in online lectures, and communicating with colleagues. Examples illustrating the analysis include: *"It helps in studies to find the necessary information, perform tasks in a virtual environment, respond to inquiries, listen to lectures, and complete written assignments"* (N\_12); *"Completing tasks, searching for information, communicating with colleagues"* (N\_4). During lectures, they use a wireless (wifi) network to access the internet, read literature, participate in online lectures or consultations via the Teams program, complete tasks, communicate with peers, and browse social networks. Examples illustrating the analysis include: *"Access to everything is needed; without the internet, we couldn't gather information, communicate comfortably, we would lose access to all information sources,*



websites, apps" (N\_2); "For logging into lectures, searches, reading literature" (N-8); "When studying tasks need to be completed, finding information, consultations via Teams" (N\_10).

Summarizing, it can be stated that, after analyzing the responses provided by the research participants, it was found that they use a computer, smartphone, webcam, speakers, microphone with integrated speaker, Bluetooth headphones, projector, printer, high-speed internet connection, and wireless (wifi) network during their studies.

### **Usage of digital content creation tools in the study process**

The research revealed that during lectures, research participants use text editors to perform various tasks, complete assignments, take notes, and summarize the material presented by the lecturer. Examples illustrating the analysis: "I write down the information gathered during lectures and perform tasks assigned by the lecturers." (N\_3); "Many of the study assignments are presented by preparing them through a text editor." (N-9); "To organize and create text for various tasks." (N\_6). Spreadsheets are used during lectures to prepare projects, such as a "Personal Budget Plan," or to quickly perform calculations. Popular digital content creation tools include presentation software such as PowerPoint, Sway, and Prezi. Participants mentioned using these programs to complete tasks, prepare projects, and present them. Examples illustrating the analysis: "During sessions, it becomes one of the most important tools for presenting tasks to lecturers and colleagues." (N\_15); "To read presentations prepared by lecturers and to create them myself." (N\_7). Canva is used during lectures to create advertising banners, posters, and cards. These programs are used to create posters, brochures, and cards to spread ideas and share information: "Used to create posters, brochures, for special occasions, we can create a card, we can create a brochure to spread ideas, share information." (N\_9). Video creation tools are used during lectures, with iMovie being given as an example. Participants mentioned using video creation software to create movies on specific topics. With the help of these programs, participants completed assigned tasks while studying the subject "IT in Social Work." "The video creation program was used to create a presentation on the topic of the alphabet: "<...> in the language subject, we had to film an introduction and show <...> the alphabet. There are quite a few subjects in studies where video creation can be an alternative to simply creating slides." (N\_4) Mind mapping software is used during lectures to highlight the most important points. Participants also used puzzle creation programs during lectures: "We learned during information technology classes so that in the future, when working with children, we could apply it in practice, educate them, and involve them in occupational activities." (N\_5) Quiz creation programs like Kahoot are used during lectures: "Quiz

*creation, we also did during the study period, during the information technology subject, played with colleagues, now at home with family members, or in social work, we can apply such a fun activity."* (N\_12) Survey, evaluation, and self-assessment creation programs such as Google Forms are used.

In summary, it can be stated that, upon analyzing the responses provided by the research participants, it was found that they utilize text editors, spreadsheets, create presentations, advertising banners, posters, cards, produce videos, mind maps, puzzles, quizzes, surveys, and assessment tools during their studies.

### **Usage of communication and collaboration tools in the study process**

The research aimed to ascertain which communication and collaboration tools students use during their studies. During lectures, students utilize cloud technologies such as Dropbox, OneDrive, Google Drive, and file transfer as communication and collaboration tools to upload, save, and accumulate files *"Needed to save and share information with students or lecturers"*( N\_15); *"I accumulate assignment papers and other relevant information."* (N\_14). Participants in the study indicated that they share information and files among themselves using these programs, especially for larger files: *"When transferring larger documents/projects"* (N\_9). Additionally, participants mentioned using cloud technologies for group work and communication regarding tasks and assignments among lecturers or group members. Participants noted that they use learning management systems during lectures, primarily citing the Moodle platform, where they easily find lecture materials and additional information: *"You can find various materials in different formats for free, which greatly helps to complete tasks easier."* (N\_4). They use learning management systems for task execution: getting familiar with the task, reviewing task requirements and deadlines. *"It's a great tool because lecturers provide all the necessary information, clearly present tasks and their deadlines. Everything is clear, simple, and organized."* (N\_9); *"To complete tasks, review information if you weren't in lectures"* (N\_3). Participants also mentioned using learning management systems to access completed tasks and assignments to review their assessments: *"Submitting tasks or checking my grades during assignments and learning"* (N\_12). They communicate with lecturers and group mates through learning management systems, and the information provided in the learning environment helps them plan their time and study process: *"Tools help to communicate, plan time, store information"* (N\_15). During lectures, they use audio and video recording platforms, with most mentioning the YouTube app. They search for video material to delve deeper into the subject matter, seeking more information on a presented topic: *"Looking for more information, deeper understanding of the subject"*( N\_12), *"When you need to find information or simply video material learning about a certain topic. Because I remember faster when I review the*

*lecture topic with another topic."* (N\_19). They use video repository materials during lectures when recommended or shown by lecturers: *"We often watch and analyze videos recommended by lecturers."* (N\_13). Additionally, they use video repository materials to complete tasks, incorporating them into presentations to make the presentation more varied and help remember the presented information: *"Helps with preparing presentations, we insert a video during slides so that it's not boring to listen to only dry information, for relaxation, and to reinforce the material."* (N\_15). During lectures, they use conference and chat applications such as Zoom, Teams, Moodle, Google Meet, Messenger. They most commonly use these programs during distance learning to *"Attend lectures and their study materials, for presentation of assignments."* (N\_13), communicate with study groups *"When it's necessary to contact lecturers or group mates regarding tasks and assignments"* (N\_17) and for information gathering, collection *"I receive, collect, and ask for information."* (N\_13). Participants mentioned using time planning apps during lectures (citing the Google Calendar app), where they mark exams, important dates, and synchronize their lecture schedule - allowing for productive time management: *"I plan time constantly. I even have a schedule for studies where I write down lectures, tasks, and their deadlines."* (N\_2). During lectures, they use social media platforms such as Facebook, Instagram, Messenger to communicate with classmates or lecturers on certain study matters: *"When it's necessary to contact lecturers or group mates regarding tasks and assignments"* (N\_1). Social media apps are useful for sharing information among classmates: *"During lectures, we have a study group where we upload information, presentations, material useful for studies or assignments"* (Participant 3). Participants use social media platforms to collaborate on project work with classmates: *"For communication with group mates and preparation of various project works."* (N\_8).

In summary, it can be stated that, after analyzing the responses provided by the research participants, it was found that students use cloud technologies, learning management systems, laboratories, audio and video repositories, conference and chat applications, time planning tools, and social media during their studies.

## **Conclusions**

In the process of social work studies, students make use of information technologies during lectures to find information. During lectures and practical sessions, students utilize smartphones and laptops, fast internet connections, and wireless WiFi networks. To print documents, information, and study materials, they use printers and copiers.

The most commonly used technical tools for tasks related to studies include: searching for information; reading learning materials and viewing visual content;

participating in discussion forums; using email; and reviewing learning assessments.

Active students actively engage with social media platforms, learning management systems, audio and video repositories, as well as conference and chat applications. Conference and chat applications, along with social media platforms, are most commonly used during remote lectures, for communication with lecturers and peers. Cloud technologies are used to upload, store, and accumulate documents.

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# THE ROLE OF THE SOCIAL WORKER IN DEVELOPING CHILDREN'S INDEPENDENCE IN COMMUNITY CARE HOMES

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**Abstract.** *This article analyzes the role of social workers in developing children's independence in community care homes. The primary goal of a social worker's activity is to provide a suitable service and teach the recipients of their services to solve problems on their own. The children's opportunity to see and grow up in a close family environment depends on the employees' value orientation and worldview. During the deinstitutionalization processes in Lithuania, social workers had to create an environment close to the family and consolidate the family model in communal children's care homes. This article aims to examine how the training and competencies of social workers impact the preparation of children for independent living in society. Applied research methods are analysis of scientific literature and documents, expert interviews, analysis, and interpretation of research results. The review of the scientific literature, presented in the article and the research data, can be applied to improve community care homes providing social services to highlight the role of social workers in creating a safe environment for the child, involving the child in the planning and organization of activities, fostering self-confidence and their abilities.*

**Keywords:** *community children's care home, independence development, organizational activity, social services.*

## Introduction

The Lithuanian strategy "Lithuania 2030" (Lietuvos Respublikos Vyriausybė, 2023) calls for strengthening the family by creating a family-friendly environment, expanding the system of complex services and infrastructure, and creating and shaping a positive public attitude towards the family. The state must help and protect the family as an important value for the entire society, implement an appropriate family policy that would effectively protect the family and ensure favorable conditions for raising and children (Gražulis, Čižikienė, 2016; Kiaunytė, Lygnugarienė, 2019; Žalimienė et al. 2020; Tamutienė, Snieškienė, 2023). Article 38 of the Constitution of the Republic of Lithuania (Lietuvos Respublikos Seimo kancelarija, 1992) states that "the family is the basis of society and the state. The state protects and nurtures the family, motherhood, fatherhood and childhood", but there are families who are unable to adapt to the rapidly

changing economic conditions, who are unable to solve their problems and take care of their children's future properly.

The following reasons can be distinguished when a child loses parental care: when parents do not take care of the child, do not take care of it, do not raise it properly, use physical or psychological violence, and so on. (Augutavičius, Butvilas, 2018; Simonovič, Osewska, 2023). Thus, these children need complex help that would correct and reduce negative life experiences and create conditions for the successful physical and psychological development of the child (Gudžinskienė, Raudeliūnaitė, Uscila, 2017). Social care is provided when solving the problems encountered by the child, which includes a whole range of services, providing the child with complex assistance and constant supervision by specialists. The United Nations Committee on the Rights of the Child, taking into account the General Assembly's 2009 December 20 annex to resolution 64/142 "Guidelines for alternative child care" (UN General Assembly, 2010), recommended Lithuania provide family or community care options for children who have lost their families, assessing the child's individual needs. Taking into account the General European guidelines for the transition (Stražinskaitė, Kvieskienė, 2015) from institutional to community care and quality standards and based on the best practices of the European Union, in 2014-2020, institutional restructuring of the childcare system was released, ensuring children's interests and the right to grow up in a family or community (Gvaldaitė, Šimkonytė, 2016; Pivorienė, 2020).

The problems of children who have lost parental care examined by Vitkauskas (2010), Ryan, Perron, and Huang (2016), Mazolevskienė, Morkvėnienė, (2016); separation from parents and placement in a care institution was analyzed by Pūras (2012), Snieškienė, Tamutienė (2014), Budrienė, Kiaunytė (2021); aspects of the education of children living in foster homes studied by Gudžinskienė, Augutavičius, (2014), Toliušytė, Plaušnaitienė, (2015), Dudaitė (2016), Bromer, Korfmacher (2017); aspects of the education of children living in foster homes analyzed by Valužytė, Žebrauskaitė (2020).

This article analyzes the role of social workers in developing children's independence in community foster homes that provide short-term or long-term social care. It is a "social care institution providing social services, where up to 8 children live in the community in separate premises (house, apartment) according to the family environment model" (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2014). When providing social services to children who have lost parental care, social workers must understand the importance of deinstitutionalization in the social services system and organize their activities as close to the home environment, taking into account the child's needs to grow and develop and prepare for independent life in society.

The scientific problem is formulated as the question of the role of the social worker in creating a safe and family-friendly environment for the child and



involving the child in the organization of various activities in community care homes. The purpose of the article is to reveal the influence of the social worker's training and competencies in preparing children for independent life in society. To achieve the goal, the following tasks are set: evaluate the aspects of social work with children who have lost parental care in community foster homes; reveal the role of the social worker in creating an environment close to the family and developing the independence of children in community care homes.

### **Changes in social work with children lost parental care in community care homes**

The family is one of the first shapers of a child's comprehensive education and moral values. While growing up in the family, the child begins to learn the peculiarities of socialization, his character is formed, unique traits of character emerge, and parents must provide the child with all the necessary conditions to grow up in a socially safe environment and learn by observing others. The family is a kind of small community with its structure, and regularity of functioning, which determines the upbringing, education, and social well-being of children. We live in a constantly changing society, so when economic and social conditions change, the institution of the family is inevitably affected. Major changes in the state usually lead to fundamental changes in family life but are influenced by various negative factors. The family can become a not-safe and nurturing small community that is unable to solve existing problems and adapt to rapidly changing economic conditions, cannot independently solve its problems, and properly care for the children's future. Children who grow up in families and experience difficulties due to certain reasons - family life conditions (alcohol consumption, violence, neglect, crisis of values, unemployment, non-compliance with social norms, impaired cooperation, emotional communication, etc.) are more vulnerable and need help (Cudak, 2011; Ivanauskienė, 2012; Simonovič, Osewska, 2023).

Children, lacking a positive model of parental behavior, do not have enough social skills to solve the problems that arise. This is why they are often rejected by their peers, experience loneliness, and are unable to name their feelings or fit in the social environment. Bartkutė, Čižikienė (2012) states that when a family is no longer able or does not have the necessary conditions to perform family functions, it experiences a family institute crisis. Such a family, affected by demographic, cultural, and socio-economic problems that harm the stability of the family institution, is "pushed" to the social fringes (Masiliauskienė, Griškutė, 2010; Cudak, 2011; Vaitiekienė, 2013; Simonovič, Osewska, 2023). Children face various psychological, emotional, and spiritual difficulties and experience communication problems. It was established that children from problematic families adopt social value attitudes more slowly and have difficulty making

decisions in their independent lives (Gražulis, Čižikienė, 2016; Čižikienė, 2018; Račkauskienė, Zbarauskienė, 2023). Scientists agree that children of families experiencing difficulties often lack social skills because the people closest to them face the same problems and they do not have the opportunity to acquire social skills, so it is necessary to provide conditions for socialization and integration into society for the children of these families (Bartkutė, Čižikienė, 2012; Gudžinskienė, Augutavičius, 2014; Augutavičius, Butvilas, 2018; Čižikienė, 2018; Račkauskienė, Zbarauskienė, 2023; Bernedo et al., 2024; Philip et al., 2024).

In the activity description of community children's care homes (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2021), the municipality must ensure that the child grows up in a close family environment. "Services provided by Community Children's Care Homes (CCCH) can be supplied by social care institutions whose social care meets the norms of social care and which have a license to provide social care" (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2021). The purpose of community children's care homes is to ensure quality services and create suitable conditions that would allow the child to grow safely, develop, and prepare for an independent life. Therefore, the activities of social workers must be directed towards the development of children's social competencies. They must help children adapt more successfully in the community, integrate, and live a full life. Social workers perform many and varied functions. It is necessary to note that, in the course of their activities, social workers must assist children facing various problems. Social work in community care homes has a wide profile, so in order to provide effective help and quality services to children who have lost parental care, it is important to improve the skills and creativity of social service workers to achieve changes in children's lives. Social work is a specific activity requiring special skills. As enshrined in the Law on Social Services (Lietuvos Respublikos socialinių paslaugų įstatymas, 2006), "social services are provided to a person (family) who, due to age or disability, has lost the abilities and opportunities to independently take care of his personal life and participate in society" (Lietuvos Respublikos socialinių paslaugų įstatymas, 2006). Social workers working in community care homes help and assist children with difficulties and problems in life, and persons performing social work must have certain character traits and abilities based on the values of social work (Prakapas, 2007; Čižikienė, 2020).

According to the Activity Description of Community Children's Care Homes (Lietuvos Respublikos socialinės apsaugos ir darbo ministras, 2021), the goal of community children's care homes is to provide the child with living conditions close to the family, corresponding to his well-being, physical, mental, spiritual, moral, and social development. When describing social work, the following areas are distinguished in CCCH: social work as a response to concern and need; a creative combination of knowledge, values, and skills; problem-solving process;

and intervention in human interaction. The help provided by the social worker to the child is expressed in the following ways: providing social services, implementing adaptation and social correction, and carrying out supervision and prevention.

The Law of the Republic of Lithuania on Social Services (*Lietuvos Respublikos socialinių paslaugų įstatymas, 2006*) states that the following principles must be followed when doing social work: cooperation, participation, complexity, accessibility, social justice, suitability, comprehensiveness of effectiveness (Augutavičius, 2019; Čižikienė, 2020). When providing help, a social worker encounters principles that require tolerance and empathy. Children expect social workers to give them moral support and understanding. Therefore, a social worker not only performs functions but is also a creative and empathetic person who can understand the personal needs of each child.

When defining the areas of activity of a social worker in community care homes, the following can be distinguished: determination and assessment of the child's needs; support and aid planning; provision of assistance; assessment; organization of activities; improvement of professional activity and upgrading of qualifications. Thus, the specified areas of activity and their diversity in social work require special abilities of social workers. Therefore, when performing his functions, the social worker faces certain professional roles, which ensure the child's well-being and interests between institutions in solving various problems (Milkintaitė, Marcinkevičienė, 2013; Račkauskienė, Zbarauskienė, 2023). The main goal of a social worker's activity is not only to provide help but also to teach children to solve problems independently (Kiaunytė, Lygnugarienė, 2019). By representing the child's interests, the social worker fulfills one of the main goals - developing the person's ability to solve problems independently. This means that the social worker does not have to solve the problems themselves but find a way to do it by involving the interested parties.

Children who have lost parental care are the most vulnerable members of society. To provide them with effective help, qualified employees are necessary, so social workers must constantly improve and use creativity to find new ways to solve the problem. However, when applying new methods, it is necessary to combine creativity with the rules and norms of the organization and not to deviate from the law. Community children's care homes are special in the nature of their activities because they work with vulnerable children. The aim is to help children who have lost parental care to become independent and able to properly organize their lives, therefore it is necessary to look for a modern human resources management model that would offer effective ways to overcome social risks, exclusion, and poverty (Samašonok, 2013; Čižikienė, Gražulis, 2016; Čižikienė 2018; Raudeliūnaitė, Gudžinskienė, 2022 ). When representing the child's interests, the social worker often experiences stress, because he has to help solve problems independently and make decisions efficiently, he must not lack

sensitivity and reflection (Toliušytė, Plaušinitienė, 2015; Čižikienė, Gražulis, 2016; Čižikienė 2018; Valužytė, Žebrauskaitė, 2020). A social worker cannot be impulsive and act recklessly. A work in a care home requires not only physical and mental abilities but also the ability to manage emotions and anticipate problematic situations in which they must represent the child's interests and make the best decisions for the growth of the child's personality.

### **Research methodology**

The research problem is what is the role of the social worker in creating a safe and family-friendly environment for the child and involving the child in the organization of various activities in community care homes.

The object of the research is the role of social workers in developing children's independence.

The purpose of the study is to reveal the aspects of the activities of community care institutions, implementing the transition from institutional care to services provided in the family and community.

The tasks of the empirical research: 1) to conduct a survey of the opinion of social workers, which would help to determine the work methods of the social worker in developing children's independence; 2) to propose ways and means that can be applied in social work in creating a model close to the family, in creating cooperative relations with the child in community care homes.

A qualitative research strategy was chosen for the study (Maxwel, 2008; Žydžiūnaitė, Sabaliauskas, 2017). Qualitative research is a systematic study of a situation, case, event, individual, or group in a natural environment, where the aim is to understand the researched phenomena and to present an interpretive, holistic, generalizing phenomenon from the analysis of situations (Žukauskienė, 2008; Lichtman, 2014). This research strategy was also motivated by the fact that the necessary information was obtained through a direct, targeted interview with the research participant. The direction and content of the conversation is determined by the research problem. Empirical research based on the chosen strategy provides an opportunity, taking into account human experience, to reveal the investigated phenomenon, and to understand the problem areas of the research related to the topic. Qualitative research is not limited by the characteristics of the sample size. That is why the sample size is not important (Bitinas, Rupšienė, Žydžiūnaitė, 2008; Lichtman, 2014; Žydžiūnaitė, Sabaliauskas, 2017).

The target criterion was selected for the sample of research participants, the following criteria were distinguished: social workers with social work education, and experience of social work in community children's care homes for more than one year. Due to the detail of the phenomenon under consideration, a semi-structured interview was selected for the study, which helps to obtain detailed answers from the informants and systematize the data (Maxwel, 2008). The

interview method makes it possible to acquire information in a targeted way by communicating with the research participant, while semi-structured questions help to reveal a broader picture of the researched phenomenon during the interview. Five social workers who met the selected criteria participated in the study. Experience of social workers in community care homes - from 2 to 5 years. All research participants have a university education in social work: two social workers have a bachelor's degree, and three participants have a master's degree. During the qualitative research, all the ethical principles of the research were followed. Therefore, before conducting the semi-structured interview, a meeting time and place convenient for him was discussed personally with the social worker. It should be emphasized that the respondents participated in the study voluntarily. Before the interview, they were introduced to the purpose of the study and, the information received, and the issues of confidentiality and anonymity of the research participants were discussed.

### **Research results and their discussion**

The study revealed that the role of social workers in developing children's independence is particularly important. The children's opportunity to see and grow up in a close family environment depends on the employees' value orientation and worldview. In community care homes, social workers introduce and develop the social skills of children who have lost their parents' care: *Children go to the clubs themselves. They go to the city, to sports clubs, go to the cinema... They clean their rooms because they live here themselves. There is general cleaning, on weekends, when the children tidy up their room and change the bed linen... (SW\_1); We try to have the children plan the menu and cook it themselves. The children clean the rooms every day, make the bed, take out the garbage, and clean the dust (SW\_2); We show how to pay via the Internet (SW\_1); we go shopping together at the store, the children help carry, and they can also compare the prices of products (SW\_4); Older children willingly cook, younger children watch, get involved and help prepare lunch for the whole family..... the children themselves maintain order in the rooms (SW\_5); children cook by themselves with our help, according to their needs, together we made a menu, a shopping list, we look according to the money we have (SW\_3).* In conclusion, it can be said that social workers develop children's social skills and independence in everyday life, allowing them to cook, shop, and manage their environment.

When talking about preparing children for independent life, social workers say that their role is particularly important, they play a key role in preparing children who have lost parental care for independent life. The research participants mentioned that they play the role of mother and father in their children's lives, most of the informants emphasized that they often take on the functions of parents because the children even say: *You are like a mother to me*

(SW\_3). *The role of the social worker is monumental. You are also in the role of mother. You have to predict where the child may not succeed, and what he needs in his independent life... (SW\_1); You have to gain trust from the child so that he recognizes you as a close person, and then only as an employee (SW\_2); I am an example for them... My example for them is this: not only my family is important to me, but the children in the orphanage are important, they see it and appreciate it... (SW\_4).*

The research aimed to find out the influence of social workers in contributing to the successful integration into society, when children reach adulthood and start living independently: *We release them as our children, and we continue to provide support and care for them. Support, that we will always be there to help, they can turn to if they need advice, help... (SW\_2).*

During the research, it was found that the social competencies of social workers are important for the successful future of children: empathy, self-control, and patience: *You need a lot of patience with children (SW\_2). Sometimes we want to do things for the children because here it is easier and simpler than asking them to do the set work, but you explain long and patiently how to do it and wait for the child to do the work independently (SW\_3); They need to be understood and motivated so that they try to be more independent as much as possible (SW\_4).* The informants agreed and confirmed that it is necessary to prepare children for independent life as early as possible: *children's personal accounts are opened, we teach how to use them... preparation for independent life starts from the age of 14 (SW\_5); independent life plans are made for children from the age of 14. We explain about the future, about the need to choose a specialty... (SW\_1); children are introduced to the possibilities of social housing and the procedure for obtaining housing: ...we process together documents for social housing for the municipality from the age of 16 (SW\_2).*

Research participants agree that to prepare children for an independent life, the development of financial literacy is necessary, children must understand the management of financial affairs, anticipate the management of their finances, and know the consequences of financial risks: *From the age of 14, children can dispose of pocket money and can spend money from a card at their own expense (SW\_2); expenditure planning is necessary, children were given a certain amount, they have to buy clothes for themselves, keep money for entertainment (SW\_5); We have financial literacy classes... children from the age of 16 participate in the class, when the child is conscious and understands what finance is... (SW\_1); For older children, we even organize meetings with the bank... Trainings are held with bank employees who voluntarily introduce them to financial management, and answer children's questions...(SW\_4).*

During the research, the opinion of the respondents was evaluated as to how it is necessary to create an environment close to the family according to the established family model, the respondents distinguished that it is necessary to

include the child in common activities at home, to create such an atmosphere that the child would like to return to the foster home, to protect and preserve it: *We create such an environment, that the child has his personal belongings, i.e. i.e. wardrobe, bed, drawer, own personal space (SW\_3); they felt that we took care of them more, we became like a large family (SW\_5); the children realized that they live in a different environment... their experiences in the family are really negative... so when they start caring about the beauty of the care home, you realize that the child wants to live in a more beautiful world (SW\_4).* When creating an environment close to the family, social workers stated that they try to create and maintain family traditions: *We have a tradition of celebrating St. Christmas, St. Easter, we prepare traditional meals, remember family customs (SW\_1); ... we like to sit together, talk together, cook together (SW\_3); from traditions, from quiet conversations, shared dinners, tea drinking afternoons... and a family begins (SW\_2).*

When discussing the opinion of social workers regarding the competencies in working with children in foster homes, the research participants agreed that additional training is needed, especially, *"training about the traumatic experience of children would be useful because sometimes they cannot be interested in taking care of themselves, children often express anger when they need to do daily tasks (SW\_3); Psychological resilience must be developed, the ability to recognize the burnout syndrome, because you must notice when the work in the care home becomes difficult...you must stop...you cannot help the child (SW\_2); We have to learn and improve, review something we could improve...so that the children are happy with the current situation in the care home (SW\_5).* Evaluating the interviews of the participants, it can be said that the training of social workers is not enough, team and personal supervision of employees should be regularly organized, training should be organized to develop the missing competencies, so that social workers have a good emotional well-being to work with children.

In summary, it can be said that the influence of social workers is very important in contributing to successful integration into society, when children reach adulthood and start living independently, and properly applied social work methods strengthen the sense of security of children who have lost parental care, increase their abilities, develop independence skills and have a positive effect on their attitude towards future life.

## Conclusions

The purpose of community children's care homes is to ensure quality education, care, and social services for the child under care, to create suitable conditions, and to maintain an environment where the child can safely grow, develop, and prepare for an independent life in the community. Therefore, the activities of social workers must be directed towards the development of

children's social competencies, these activities should help children to adapt more successfully in the community, integrate, and live an active, fulfilling life.

Analyzing the experiences of social workers working with children who have lost parental care in community care homes, it has been determined that the quality of social services provided, the satisfaction of the child's needs, and problem-solving depend on the preparedness of the staff. When working with children who have lost parental care, a social worker must be highly qualified and motivated, as not only the quality of services provided, but also the ability of the child, who has experienced various life difficulties, to independently solve problems and future prospects depend on them. Thus, the study revealed that, for the well-being of the child, the most important person is the social worker, who bears great responsibility not only for providing assistance to the child and cooperating with various institutions but also for nurturing the individual, fostering values, and social norms. The study revealed that the social worker plays the role of a parent, but whether they always have the opportunity to make decisions and act at their discretion, social workers did not comment.

Social workers perform many and varied functions. It is necessary to note that, in the course of their activities, social workers must assist children with various problems. Social work in community care homes requires not only good physical but also psychological health, therefore, in order to provide effective help and quality services to children who have lost parental care, it is very important to improve the skills and creativity of workers providing social services in order to achieve changes in children's lives. When providing services to children, it is necessary to organize their daily lives in such a way that the children get involved in various activities, move away from the negative social environment, and develop social resilience to meet the essential needs of the child and create opportunities for the child's well-being. In community foster homes, children learn social skills that are necessary for children's successful socialization and integration into society.

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# PREREQUISITES FOR THE APPLICATION OF INNOVATIVE METHODS IN SOCIAL SERVICE ORGANIZATIONS

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**Abstract.** *This article analyzes that when solving social problems, most welfare states choose a social security system model in which social service organizations provide professional services and help ensure the well-being of residents in the community. Social challenges require changes and new solutions in the activities of organizations providing social services, which can help solve emerging social problems by offering service recipients new forms of social services. The purpose of the article is to reveal the prerequisites for the application of innovative methods for the solution of social problems and the implementation of the application of new managerial practices in organizations providing social services. Applied research methods - analysis of scientific literature, interviews of social workers, analysis and interpretation of research results. The article provides a review of the scientific literature and research data that reveal the desire of social workers to apply modern technologies in social work, which help to discover new work methods and managerial practices in the social services sector. The pursuit of innovation in organizations providing social services ensures a favorable atmosphere for the creativity of employees and service recipients and provides an opportunity for the continuous improvement of employees in the organization.*

**Keywords:** *innovations, organizations providing social services, social services.*

## Introduction

Each organization has its characteristics: conception, process, culture, practice, and capabilities. From these characteristics, it is recognized that it is an organization, regardless of whether it operates in the public or private sector. A crucial element of an organization is innovation, without which new developments will not be implemented, new challenges will not be raised, ideas will not be generated, and the organization will not be modern and contemporary, lacking novelty. Organizations providing social services, addressing social issues and seeking to ensure community welfare, strive to provide professional social services by choosing a model of social protection system. Research conducted by (Birdi, Leach, & Magadley, 2016) shows that individual factors greatly influence idea generation, while internal and external factors influence its implementation. Spencer's set of leadership competencies influences the implementation and

generation of ideas: external environmental factors, followed by support and external environmental endorsement (Spencer, 2003). Demircioglu suggests that organizational innovativeness involves an idea, a new product, a new method, a new service, a new process (Demircioglu, 2016).

The most widely used definition of „innovation“ was proposed by J. Schumpeter 1934 (2008) (Croitoru (2012), which is *„the commercialization of all new combinations based on the application of new materials, a new supply source, a new production method, a new product, a new market, or a new organizational approach.“* Schumpeter identified five types of innovations: new or improved products, new production methods, new markets, new sources of production factors, and new organizational methods. Schumpeter's definition indicates that innovations depend not only on new inventions but also on the organization of implementation processes at the organizational level. Numerous studies have been conducted to successfully define the innovation process, and classical innovation research is related to product and process innovations (Salter & Alexy, 2014). In scientific literature, innovations are associated with novelty – a new phenomenon and activity in implementing innovations. Kotler (2011) suggests that an organization implementing innovations must define and assign roles to specific individuals and, having set goals, resources, and deadlines, allow them to interact freely in the creative process. Mumford and Gustafson (1988) argue that *„the innovation process begins with individuals' creativity, so the generation of new ideas is a cognitive process within the individual, albeit stimulated by the interaction process.“* It can be said that the individual is the main driving force capable of initiating new, innovative processes within the organization, thus the leadership position is particularly relevant when implementing a quality management system in the SPT organization, considering the rapidly changing society and organization (Souba, 2014). According to West and Richter (2008), implementing innovations requires changing existing structures, routines, and environments, which can lead to resistance and conflicts within the organization. Therefore, the manager must understand that the implementation process is a continuous effort requiring new decisions in management. The authors identify several important factors that help both the manager and the group to commit to the vision, participate in decision-making, manage conflicts, support innovations, ensure safety and trust, and be flexible. Kautz and Larsen (2000), based on Rogers (1983), argue that individuals (adopters) must go through five stages when implementing innovations: knowledge (understanding how the innovation works), persuasion (forming an opinion about the innovation being implemented), decision (making the decision to implement it), implementation (finding means and ways to implement the innovation), and confirmation (determining and confirming that the implemented innovation is appropriate or aiming to further improve it). This comprehensive implementation process, according to Shalley and Zhou (2008), involves

continuous problem-solving, which identifies and implements new problems, with the result being changes at various levels, directed towards the goal. Amabile (2011) and Mueller (2020), creativity can encompass individuals, teams, and entire organizations and can be analyzed at the levels of individuals, groups, and the organization as a whole. Amabile (2011) identifies areas encompassing creativity: important skills (competencies required in the social services sector: knowledge, experience, intellect, insights, skills), important processes (work styles, personality characteristics), and task motivation (goal setting, striving, and implementing a vision). Zhou (2003) states that managers can enhance and sustain employee creativity by utilizing everyday leadership behavior. Amabile (1988) highlights environmental factors within organizations that inhibit creativity, including criticism and rejection of new ideas, organizational issues, emphasis on status and power, and conservative and autocratic leadership styles.

The role of leadership is important in the implementation process because, as indicated by Oke, Munshi, and Walumbwa (2009), leadership is a social process consisting of the following components: firstly, it occurs within a group; secondly, the leader influences the behavior of their followers; thirdly, organizational goals are pursued together. This study focuses particularly on understanding formal leadership among managers when examining the implementation of quality management systems in organizations providing social services. Davila, Epstein, Shelton (2012) define the roles of managers in this process, which include supporting strategic planning, providing long-term perspective and evaluating organizational alignment; managers involve departmental leaders and managers in the process and empower them to carry out key project stages; they collaborate with external partners; they draw conclusions and make important decisions regarding changes; managers also manage and maintain a balance among all system elements.

Matthews and Brueggemann (2015) suggest that leaders must exhibit innovative behavior and thinking, problem-solving skills, continuous improvement in knowledge, creativity, fostering a culture of quality, innovation diffusion, entrepreneurship, strategy implementation, effective leadership, and systemic thinking when implementing innovations. Successful leadership should encompass individual traits and competencies, team support and endorsement, managerial skills, effective guidance, and leadership. Many scholars, such as Dinh, Lord, Gardner, Meuser, Liden, Hu (2014) and Kang, Solomon, Choi (2015), argue that leaders demonstrating transformational leadership create and apply innovative ideas in leading their organizations, motivate their followers in various ways, and seek new motivational methods to achieve set goals. Specifically, transformational leaders have a significant and positive impact (Nguyen et al., 2017) on engaging and encouraging their followers to participate in implementing innovative processes. The leadership process within SPT organizations is a fundamental element of managing an effective organizational structure,

implementing management systems, and achieving organizational goals and objectives; therefore, leaders must be able to harness creativity within their organizations to foster initiative and innovation (Bartlett and Ghoshal, 1995; Kiel, Hendry, Nicholson, 2006; Agbor, 2008; Little, Gooty, Williams, 2016). Effective leadership is important not only at the organizational level (Henry, 2012) but also in changing attitudes toward the social services sector in society. Leadership is not needed if there are no new challenges (Bridgeforth, 2005). Satalkina, L., & Steiner, G. (2022) argue that considering future pathways, we view social innovations as an integral part of holistic intervention, operating across one societal dimension and making a systemic impact on sustainable societal development. Lepik, Urmanavičienė (2022) state that one of the main characteristics of social entrepreneurship is innovation creation. The authors emphasize that "*social mission is a highly valued aspect of social entrepreneurship, which is undoubtedly considered a necessary condition for social entrepreneurship. Social entrepreneurship is primarily about creating social value, promoting social well-being, solving social problems, and addressing social needs*" (Lepik, Urmanavičienė, 2022). Perceptions of social innovation are quite diverse and varied, often conflicting with perceptions of business innovation, as the latter typically aim for profit, while the goals of social innovations may encompass societal well-being, providing opportunities for vulnerable and sensitive social groups, social cohesion, sustainable development, and alternative perspectives on market economics (Labanauskas, 2017).

### **Research methodology**

*This article addresses the problematic question of the study:* What motivates social workers in social service organizations to apply innovative work methods? How can the implementation process of EQUASS help in finding solutions to new social problems and implementing new managerial practices?

*The aim of the article* is to uncover the application of innovative work methods in organizations providing social services.

*Research object:* Conditions for the application of innovative methods in social service organizations.

*Research methods:* include analysis of scientific academic literature analysis, document analysis, qualitative research type was chosen for the study (Židžiūnaitė, Sabaliauskas, 2017). In the study, the method of a semi-structured interview, quality (content) analysis, summarizing method were used.

*Participants of the empirical research:* social workers employed in social service organizations implementing innovative work methods and aspiring to or having EQUASS certification.

## Research results and their discussion

The literature review and research data presented in the article reveal social workers' desire to use modern technologies in social work, which helps identify new work methods and management practices in the social services sector. The aim to innovate social services in providing organizations fosters a favorable atmosphere for employees and service recipients, promoting their creativity and providing opportunities for continuous employee development within the organization. During the study, social workers indicated that their decision to adopt new management practices was driven by creativity and a desire for improvement, aiming to implement new practices that would lead to high-quality services and operational outcomes. They described the implementation process as a creative outcome, propelled by innovation and creativity, and suggested that the EQUASS implementation process could help identify new solutions to social problems and facilitate the implementation of new management practices. Social workers identified the following categories: Aspiration for innovation; Novel approaches to solving social problems; Implementation of new practices within the organization. "More specifically, the research data indicate that the aspiration for innovation among social workers is related to their attitude towards presented theoretical concepts. Creativity in social work stimulates organizational changes, demonstrating that *'the implementation process is closely related to the creativity of social workers'* (E\_1). This creativity drives innovation at the organizational level and changes in the external environment.

Social workers, by showcasing their creative potential through behavior, can encourage and support collaboration and the creativity of colleagues. Additionally, *'the creativity of a leader and their individual qualities influence the application of new management practices and the resolution of social problems'* (E\_2). According to Amabile and Mueller (2008), *'creativity encourages people to work creatively and collaborate to implement innovations'* (E\_1). „Expanding its possibilities, an organization can change the external environment by employing new methods of solving social problems“ (E\_3). Social workers note that „the EQUASS system helps find ways to address social issues, meet service recipients' expectations, and explore new solutions, especially when working with young service recipients who crave interesting work formats“ (E\_4). It is also emphasized that *'EQUASS principles allow for the adaptation and resolution of problematic and conflict situations, as this helps understand and serve from the perspective of service recipients'* (E\_5)."

According to informants, the improvement of social services is associated with new ideas. "Usually, a new idea is born, we try it out, we search for it ourselves and go to prove and present it, and say let's do it, improve it... our services," (E\_1) and is understood as an action or activity that is carried out with consideration of the set goal, new requirements, or standards: "We will all improve



here to achieve the goal, I took on several training sessions and executed them, we discussed with employees about improving social services," (E\_2). "This shows the institution's desire to improve, to provide quality services, to move forward, because facing challenges, we learn from them," (E-4), and the directions for improvement are planned when it is possible to rely on certain experiences, necessary skills, and abilities: "We have already established how to measure it, show others how we work qualitatively," (E-9). During the improvement process, restructuring and changes are made by implementing new work methods: "The institution has implemented several innovative working methods, especially for people with disabilities (camera Maus), symbol method, color music, canine therapy, dance-movement therapy, sensory room, etc., we are moving towards improving social services," (E-7). Social workers assume that in the process of improvement, the experience of service providers is important in evaluating the competence of employees: "The challenge is that the client will have the right to evaluate the employee" (E\_8), "EQUASS clearly emphasized the empowerment of service recipients and quality of life, that should be a priority and the leader should emphasize it in his organization" (E-10), thus the attitudes of service recipients change because when implementing EQUASS services, the service user is involved in the evaluation process: "that the service recipient will have the right to evaluate the employee, how will the dance therapy service user evaluate me here, because often the employee is not sure that he will be evaluated well, it really encourages the improvement of social services" (E\_8).

Application of new management practices in the organization. Research participants, discussing innovative factors, highlighted that EQUASS helps to implement new management practices in the organization: "Employees need interesting forms of work, it was just interesting, the idea itself was interesting" (E-10), "for us to find out what is happening in the world, so that we could apply all innovations in our work" (E-10), it was necessary to find new tools and overcome challenges: "and this means that remote work is still a challenge... and during remote work, we just had to find the best tools to work" (E-9), "Innovation in the organization, because the attitude of the team changes and you have to work with the whole team according to EQUASS criteria, comply with them and apply them" (E\_1), "It is especially about the principle of attitude and participation, because we have already had meetings with employees about changes, we discussed a lot and wanted to change certain forms and documents, and certain practices change..." (E\_2). It is important to note the respondents' opinion that EQUASS ensures organizations the opportunity to change and improve: "The organization must change, improve" (E-7), "For organizations, this is clearly an innovation" (E\_1), "Changes force you to change your thinking, to apply new management practices" (E\_8). According to informants, EQUASS helped to discover new ways of motivating employees and apply them in their organization: "So we start thinking differently... and we give days off, work from

*home, remotely" (E\_2), "We have created an initiative group of employees so that employees can raise various ideas among themselves and implement them, as a collective we try to go out once a month to motivate the employee to work as much as possible" (E\_4). Social workers indicate that this is also a challenge for them because employee motivation at work becomes a challenge, it is necessary to see each employee and respond to their needs, apply new motivational measures, as often organizational leaders have limited financial resources, therefore they are looking for ways to evaluate and reward employees for their efforts: "This motivation is really a big challenge for the manager... you need to find ways to motivate employees, the manager cannot be as before" (E-4), "I also tried to encourage employees with bonuses and joint trips (we travel to the sea for a few days), to find ways to see everyone" (E-5), "we have birthdays and we always come up with something, we have to come up with something, involve, thank" (E\_4).*

The study revealed that the ambition of social workers for innovation is based on the application of new ideas and knowledge in their organization. Most respondents indicated that the application of innovations is driven by their desire to improve and unleash their creative abilities. Therefore, the personal interest and "burning" goal of social workers engage employees in the implementation process. The ability of a social worker to assess individual employee efforts motivates them to change their attitudes towards work and commit to achieving organizational goals. Social worker leadership has a significant impact on fostering creativity at the organizational level. It was also found that leadership influences directing employees' creative potential towards service improvement and implementing new management practices. Therefore, the creativity of leaders directed towards QMS implementation and execution ensures successful EQUASS implementation (Čižikienė, 2020). Based on the findings of Gudžinskienė, Gečienė (2018), it appears that the quality of social services in Lithuanian social care institutions is remarkably high, despite Lithuania's relatively low GDP percentage allocated to social assistance. This suggests remarkable achievements in social support and positions Lithuania as a potentially exemplary model for other EU countries to follow. Kubiliūtė, Neverauskienė (2023) taking into account the aspects of the definition of social innovation, it was decided that the definition of social innovation should emphasize the following key directions: novelty, responsiveness to social needs, sustainability of social changes, and transformation of social relationships. Social innovations are defined as the creation of new ideas, products, services, or methods, as well as the use of existing ideas, products, provision of services, or application of methods in a new or different way to address social and economic issues and more effectively meet social needs. The most important dimensions of social innovations include meeting human needs, social interaction and inclusion, as well as increased opportunities for socio-political activity and access to resources. Although there

are plenty of good ideas, the impact of social innovations is still insufficient, so it is necessary to promote experimentation and the creation, implementation, and development of new innovations using appropriate means. Competent intermediaries, effective incentives, and networks are needed to accelerate and facilitate learning.

## **Conclusions**

The literature review and research data presented in the article reveal social workers' desire to use modern technologies in social work, which helps identify new work methods and management practices in the social services sector. The aim to innovate social services in providing organizations fosters a favorable atmosphere for employees and service recipients, promoting their creativity and providing opportunities for continuous employee development within the organization. Innovativeness is perceived as the potential of human resources' possessed characteristics to create and stimulate changes within an organization, applying employees' skills and motivating them to utilize those skills for the creation of common good, not only at the organizational level. Social workers identified the following categories: Aspiration for innovation; Novel approaches to solving social problems; Implementation of new practices within the organization.

In analyzing the motivations behind social workers' decisions to implement new management practices in their work, research participants indicated that their decision to adopt new management practices was driven by creativity and a desire for improvement, aiming to implement practices that would enable the provision of quality services, taking into account the individual needs of service recipients. Participants described the implementation process of the quality management system as the application of innovative work methods in social work and confirmed that the EQUASS implementation process helps to identify new solutions to social problems and facilitates the implementation of new management practices within the organization.

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The ability of a social worker to assess individual employee efforts motivates them to change their attitudes towards work and commit to achieving organizational goals. Social worker leadership has a significant impact on fostering creativity at the organizational level. It was also found that leadership influences directing employees' creative potential towards service improvement and implementing new management practices. Therefore, the creativity of leaders directed towards QMS implementation and execution ensures successful EQUASS implementation.

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