

THE THESIS FOR THE DOCTOR'S DEGREE

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REFORM AND ECHOES

**The reception of the Romanian educational reform among the Hungarian educators
from Romania**

DE Faculty of Arts
2006

The University of Debrecen

The Faculty of Arts

The Interdisciplinary Doctor's Degree School of Arts and Social Sciences

Doctor's Program of Educational and Civilization Science

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THE AIMS OF THE DISSERTATION AND THE DELIMITATION OF THE THEME

The choosing of the theme was determined by a compound system of factors, thus for the proving of the delimitation and actuality of the theme we must start on **three lines**. According to these, *the Central-Eastern European educational reforms, the role of the educators* in the process of changing in the educational system and *the enlargement of the social demands towards the educators* delimited the direction of our research.

The Romanian education has been the scene of continuous changes in the past one and a half decades. At the change of the political system the Romanian educational system was one of the most centralized in Europe, thus it is univocal why the wish of the renewal of the education manifested itself in the pursuits for decentralization. In the process of the renewal and democratization of education the Romanian education was not alone. In other Central-Eastern European countries, too – a quicker or slower process with other accents, but similar, took place. “The decentralization always solves old problems and brings new ones.” – writes Cheng (1997,3) in his study on the decentralization of the Chinese educational system. At a great extent we agree with this statement since the several situations of the educational practice show us that the decentralization does not mean the solutions to all the problems in either countries, moreover these processes intensify the problems, the controversies of the given system. The same thing happened in Romania, too. Besides the several positive sides of the decentralization, in the course of decentralization such controversies appeared which were not perceptible before. The Central-Eastern European reforms have not left untouched even the situation of the teachers. The educator-society used to the vertical bureaucratic control had to face the new situation created by the changed social, political, economical environment.

Secondly, we cannot leave without attention the fact that in the professional circles more and more strengthened the recognition that the teachers are the planters of the reform in to practice in these processes. “...*The only serious supporter of an educational reform today, is the intellectuality - thus, first of all the educational society must be won over.*”- writes Kozma (1992, 41), and indeed it can be considered as an evidence the fact that any intention of reform, innovation is only one possibility till the winning over of the educators is not successful. Thus the effects of the educational changes on the participants to the educational process (students, parents, and educators) are clear.

The aim of the paper is the research on the connection between the educational reforms and the educators, more concretely, the specific connection between the Romanian educational reform and the Hungarian educators from Romania. In our investigation we focused on practising educators. Our choice for educators was not only for the fact that they are the “planters into practice” of a macro-level planned changing process, but also for the fact that we feel that in the professional literature more and more the role of the “teacher policy” in the educational policy of different countries comes to the fore. Several annalists recognize the role of the teachers in the process of the renewal, modernization of the educational system. (Kozma, 1992; Darvas, 1993; Nagy, 1993, Bunescu, 1993; Ferenczi, 1998), and in the international professional literature shows that the teachers and the schools are the main source of power in the modernization of the educational system (*Teachers Matter, 2004*). The teachers can be seen as the passive endurers of the changes, of the process of the reform, since these new processes challenge them again and again, strengthen their strain. It is not negligible the problem that the situations requiring new extra activities, information and efforts are lived through as a pressure of conformity, or rather as a possibility for a higher degree of professional identity and self-realization, freedom in choice and a chance for alternativity. In this situations the opinions concerning the profession and the education, the feelings, the attitudes and the convictions (Szabo, 1998) get an important role, and at least as important as other objective factors (aims, content, the number of the students, auxiliary means.).

Finally, we must not forget about that fact that independently from the changes in education, the social expectations and demand from education are enlarged greatly in our days, the role of school in the training for social life has changed (Husén, 1997). According to Nagy (1993), the efficiency of school appears in a more complex way, and thus the teachers' professional challenges are more. This situation confronts the educators with such tasks, which were not prepared before in our studies, because – they were not trained so, fact given by the characteristics of the situation. Therefore, the redefinition of the professional requirements of the teacher profession, the demand for the accommodation to the new situation is not a question any longer. In the document entitled *The Teacher Today*, OECD, we can read the following: “ *The teachers cannot flee from the modern constraint of the changes, the society expects from them the highest level of competence and commitment.*” (1993, 717).

According to all these the dissertation focuses on the changes in the Romanian educational system, first of all in order to present the place and role of the Hungarian teachers from Romania during the reform.

THEORETICAL BACKGROUND

Considering the buildup of the dissertation we can say that it is formed from three parts. In the first part we discussed the theoretical approaches concerning the theme, in the second we presented the situation of the Romanian education and the processes of changes in the last one and a half decades, while in the third part we summarized the results of our empirical research. So, the paper is formed from two big theoretical units, though the part concerned with the analyzation of the Romanian educational system is a transition between theory and empiricalness. The processing of professional literature forms the basis of the theoretical background, which due to the character of the theme is in Hungarian, Romanian and English. Our dissertation presents the changes in the Romanian educational system in the past one and a half decades, that is why, the mapping of the Romanian and Hungarian (printed in Romania) professional literature was indispensable. At the same time, as all these were done from the point of view of Romanian teachers, but of Hungarian nationality, and of a Hungarian researcher, we also used professional literature from Hungary. The insertion of the Romanian changes into similar Central-Eastern European or other reform processes cannot be neglected either.

The *first theoretical unit* of the dissertation discusses the subject matter of the reforms starting with the approaches to the system and ending with the primordial problems of the profession of educator. In the *definition of the educational system* (Halász, 1993b; Kozma, 1997), we discussed the specific functioning of the educational system, its connection to its environment and its relative separateness as a system (Bourdieu, 1974; Durkheim, 1978; Halász, 1993a). In a parallel way, through a survey of the different models of teaching control (Kovács, 1996; Báthory, 2000; Szebenyi, 1991; Nagy J., 1991, Horváth, 1999) we searched for the answer to the question, which model should be the answer for the earlier centralized educational systems.

We discussed the *educational reforms* in a different chapter, since these mean a starting point in understanding the essence of the Romanian educational reform. Further, in separate chapters, we analyzed more deeply the *content limitations of education* and the questions of the *profession of teacher*. The character of our theme gives this shift of proportion. We discussed the problem of the curriculum, its conceptual definition, concerning its role in the curricular reforms. The importance of the profession of teacher was univocal for us, since our research can be ranked among the sociological researches on teachers. From the point of view of our theme it is relevant the subchapter concerned with the *connection*

between the educational reforms and the teachers, which forms a "bridge" between the profession of teacher and education. The Eastern European educators of nowadays have to face the reverberations of the earlier bureaucratic controls (Darvas, 1993), the transformation of the responsibility system (Deák – Nagy, 1993; Nagy, 1994), the increasing of instability inside education (Ferenczi, 1998; Husen, 1997) and the extended professional role expectations (Hoyle, 1992). Since in our empirical research we followed the professional self-image of the Hungarian teachers from Romania, their opinion about professional evaluation and social appreciation, we discussed in the theoretical part the status of the teacher as intellectual, the subjective dimension of the being a teacher and the professional professionalism.

The second theoretical unit presents the *changes* of the Romanian education in the past one and a half decades. Here we analyzed those areas that were necessary from the point of view of our theme, in order to see in their depth the effects of the changes of the Romanian educational system on the educators. For the investigation of the effects of the reforms there is always a need for a larger analytical background. In our research the presentation of the stages and domains of the Romanian educational reform realized this. The main characteristics of the Romanian education before the changing of the political system were the lagging behind, rigidity and obsolescence (Bîrzea et al, 1993; Codiță – Pasti, 1998). This situation turned into a crisis in a short time after this. The decentralization of the Romanian educational system did not appear as a uniform, unidirectional process, thus in the course of the changes of the past one and half decades three stages can be delimited (Papp Z.A., 1998). This division into stages helps us to interpret the processes and tendencies from the period of the reform according to certain pivots and time frames. Further we considered the modifications concerning the school structures of the educational reform, and in a parallel way showing the building up of the *Romanian educational system*.

In the chapter on the *control of the education* we looked for an answer to the question whether, besides the decentralization processes, the Romanian education can be considered primordially centralized or rather decentralized. On the basis of the presentation of the levels of the controlling of education and its participants, of its functions and of the professional literature (Miroiu, M. 1998; Ivan, 1998; Ivan et al, 2000; Fóris - Ferenczi, 2004) we reached to the conclusion which forms one of the key-questions of our empirical research. However, in the Romanian education a kind of decentralization has started, the process has not been finished successfully. Practically speaking, it "stuck" at *deconcentration*. This means that the autonomy of the educational institutions does not prevail in reality, i.e. the educational ministry gave the right of taking decisions not to the schools but to the subordinated inspectorates. The county inspectorates maintained the rigid relationship with the schools, the same that was before the change of the political system. The *Romanian curricular reform* is also a key-question of our research. Besides the analysis of the stages of the changes of the curricula, we also analyzed the new basic curriculum (National Curriculum, 1998), identifying in it those modernization tendencies that have a European reference.

The second theoretical unit of our dissertation ends with the presentation of the *situation of the profession of teacher*. Our aim was not the investigation of the situation of the teachers from Romania as an intellectual stratum, but we flashed only some of its particularities that helped us to gain an insight and to get a proper background for the interpretation of the data concerning the profession of teacher. Further we delineated the supposed effects of the reform on the teachers, then we defined the "possibilities" of the professional professionalism reform. On the basis of the operative educational laws and of the Romanian teachers' training we reached to the conclusion that the professional professionalism of the Romanian teachers is constrained by the inherited centralized vocational and examination systems (examination for making permanently appointed, for the

degrees I and II). The possibilities of a career are exclusively dependent on the time spent in the profession, since these exams can be applied for only after a certain time (2+5+5).

THE PROCESSES OF THE EMPIRICAL RESEARCH AND ITS METHODS

The *starting point* of our empirical research is constituted by the changes in the Romanian educational system in the past one and a half decades. The Romanian educational reform influenced in several points the work of the teachers. The movements having the character of decentralization of the controlling of education, the curricular reforms, the transformation of the responsibility system inside education, the modifications of the school structure and exam system have all had an effect on the formation of the educators.

The positive effects of the educational reform are longer; the negative ones affect mainly those in the given system. More and more often it is formulated in the professional circles the fact that the involvement of the educators in the educational changes can not be realized without the appearance of the “owner” feeling, of essential changes. (*Teachers matter, 2004*). Starting from this assumption the *primordial question of our research* presents itself, question which searches the answer concerning the *effects of the changes in the Romanian educational system on a part of the Hungarian teachers from Romania working in the elementary training in the past one and a half decades*. Darvas (1993) lets us know that in the relationship between teachers and educational reforms usually two questions emerge. On one hand, which are the effects of the reform on the teachers, and on the other hand, how the teachers as individuals and corporative members take part in the realization of the reform process.

Starting from this investigation paradigm, in our research we were led by a compound aim. On the one hand, we were curious, which were the effects of the educational changes on the situation of the teachers (professional possibilities, school possibilities, professional self-image, social appreciation), and on the other hand, we investigated the teachers’ opinions concerning the process of changes; i.e. at what extent the educational policy could win the teachers in the process of the changes. Thus at the beginning of our investigation the following *questions* emerged:

- On the basis of which characteristics can be described the changes of the Romanian educational system in the one and a half decades: which are the stages of the reform process, which are the areas affected by the changes?
- At what extent could the Romanian educational policy “win” the practising teachers: which are the opinions of the teachers about the educational reform and about the present situation of the Romanian education?
- What is the opinion of the teachers concerning the changes and possibilities related to the decentralization of the control of education and delimitation of the curriculum?
- Which is their professional self-image and at what extent was this influenced by the short termed negative effects of the reform ?
- What is their opinion concerning their profession, its conditions, its professional evaluation and social appreciation?
- Does the opinion of the teachers concerning the above mentioned areas define the background variables that are investigated by us?

Starting from the primordial questions of the research we formulated several related one to the other hypotheses. The hypothesis system of our research has at a great extent a deductive character, since we correlate the opinions of the teachers to the characteristics and regulations of the educational reform formulated in official documents. In the presentation of the effects of the changes in the educational system on the teachers from the Harghita County, as well as their opinions, conviction, appreciation, we supposed that their opinion is influenced at a great

extent by those parameters on the basis of which the given educator-population can be described. Thus we assumed that the opinion of the teachers concerning their professional self-image, professional evaluation and the social appreciation of the profession as well as the reactions to the challenges of the reform processes might be made specific by the investigated person's age, sex, professional experience, attended schools. The stratification of the research sample according to sociodemographic points of view (*sex, age, attended schools, professional experience*) can be considered basic variables and at the same time independent variables, too. In the choosing of the independent variables we had in view that theoretical observations (Darvas, 1993), according to which the more active, flexible, innovative teachers can adapt more easier to the challenges of the educational reforms than their colleagues. According to this we used the *participation of the teachers to vocational courses*, as well as *the extra activities performed* besides their regular work activities also as independent variables. We also assumed the fact that concerning the investigated questions the *type of the schooling location* also can influence the opinions of the teachers, their capacity of evaluation. We categorized the schools according to the operating administrative points of view from Romania. Besides all these we also studied the so-called "soft" factors (thoughts concerning the profession and education, feelings, opinions, attitudes, convictions) (Szabó, 1998). Due to the subjective character of these factors a part of our suppositions is a hypothesis without an alternative direction.

According to our theme Hungarian teachers from Harghita County form the basic majority of our investigated persons. From this majority a more staged cluster-**sample taking** of 316 Hungarian primary-school teachers formed the sample. We used an expert sample taking as the first stage of the sample taking. We used primary-school teachers and not teachers from higher stage because we considered that in the given stage of the educational changes (2003) the primary-school teachers have more relevant information concerning our theme. The justification of our choice has two directions. First of all the starting with the primary school, the ascendant system of the educational reform, on the other hand, with the concrete modifications due to the processes of the reform (curricular decentralization, alternative coursebooks, optional subjects, evaluation system, and others) affected first of all the teaching-studying process in the elementary school. In the second stage of the sample taking we identified all the methodological sectors than from all the sectors in proportion to the number of the sectors we *took the sample*. Persons from towns of Harghita County (Odorheiu Secuiesc, Miercurea Ciuc, Gheorgheni, Toplița and Cristur) and from their areas were taken at random as investigated samples.

In the course of the research the used **method combination** is the specific combination of the theoretical analysis and the questionnaire survey. We used the *theoretical analysis method* in the reading of the professional literature concerning the theme from Hungary, Romania and from other countries, as well as of the official documents referring to the educational reform (operative laws, orders of the ministry, decisions of the Government, plans of the reform and curriculum). Since the strategy of our research is basically deductive and it is connected to more areas (educational reform, the situation of the Romanian education, the conditions of the work in schools, professional self-image, professional evaluation and social appreciation) we needed a greater number of data, thus we used as data gathering method the *survey based on questionnaire*. We did not use standardized questionnaire, used in other surveys, but one that was personally elaborated. After we had consulted some surveys concerning the opinion of the teachers (Bognár – Kozma, 1985; Lázár, 1992; Marián, 1998) we decided on the elaboration of a personal questionnaire. Though there may be similar situations in the renewal of different educational systems, each reform process can become unique due to the character of the given educational system and to the given time.

The building up of the empirical part starts with the characterization of the research. Here we present the antecedents of the research; in the starting point we formulate the research problem and show the characteristics of the hypotheses. Our hypotheses – given by the complex character of our theme – are paraphrased along the interpretation of the results of the examined areas. In this phase of the survey we considered important the delimitation of the size and of the concepts concerning the theme. On the basis of conceptualization we specified with what connotations we used some concepts in our research. Further we delineated the number of the investigation, the sampling technique and we present the sociodemographic particularities of the sample. We ended the part concerned with the description of the research with the presentation of the investigation methods and of the survey.

THE ENUMERATION OF THE THESIS OF THE RESULTS

On the basis of the analysis of the Romanian educational system in the past one and a half decades and of the results of our research on the teachers we conclude the following:

1. The *need for the decentralization of the Romanian education* fitting in the line of the reforms that started after the change of the political system in the Eastern European countries was indisputable, and it was the result of external and internal causes of a particular interplay. This can be connected to the fast social, economical and political changes in the former socialist countries (Riddell, 1997; Heyneman, 1998), on the other hand to the lagging behind, rigidness, inner anomalies and critical situation (Bîrzea et al, 1993; Cristea, 1993, Miroiu, 1998). The decentralization in Romania does not appear as a uniform process, having a straight direction, and only starting with 1997 we can speak about an overall change. Besides the fact that it was characterized by continuous recoiling and “back camber”, in some areas the process of the reform was faster (content delimitation, coursebooks, educational conceptions), in others was slower (laws, institutional background).
2. The changes in the Romanian education in the past one and a half decades appeared in the official documents of the reform (law of education, operative decisions and orders, reform plans, the National Curriculum) as decentralization, structural and joinable to the European directive process. In spite of the official rhetoric decentralization enunciation, the processes reached only a deconcentration (Halász – Altrichter, 2000). Thus it is not a coincidence that the views of the Hungarian teachers from Harghita County concerning the educational reform are not coherent with the theoretical enunciation concerning the reform and which appeared in the official documents. In what concerns *the joining to the European directives* and the *decentralization* of the educational system it is an important state of *disorientation* and *wobbliness* among the teachers. Only 2/3 of the questioned teachers can see the intention of orientation to the European trends, and only 1/3 feels that the changes are part of the decentralization process. These opinions are only partly influenced by the background variables, which were analyzed by us, for instance it is significant the relationship between the opinions concerning the direction of the changes and the teachers’ age, sex, and professional experience. The older, with more experience women teachers see the changes as a decentralization process. At one question the inquired persons agree totally: they do not see the reasonableness of the frequent and inconsequent changes.

3. Partly, it is due to the *short term negative effects of the educational reform* the fact that the Hungarian teachers from Harghita county have a *negative opinion* about the present situation of the educational system, they are pessimistic in what concerns the lining up of education to the European requirements. They can see this lining up through the improvement of the situation of the educational system, through a better endowment with auxiliary means, through more consequent modifications, through better professional conditions and through a greater stability. These opinions are not surprising since they are “consonant” with the specific situation of the Romanian education from the past one and a half decades. According to some analysts the Romanian reform processes have been characterized after their starting point for a long time by wobbliness, transition and instability (Codiță – Pasti, 1998; Miroiu, M. 1998; Ivan, 1998), according to others this fact has been since then (Ivan, S., 2005). After all these we cannot leave out the fact that Heyneman (1998) indicated the *need for stability* as an impediment in the mentality of the Central-Eastern European reform processes.
4. The Romanian education can declare the area of the *curricular reforms* the one with the most positive and most important changes, as the new Romanian curriculum having complex function (The National Curriculum, 1998) suits to the European directives. The former traditional, content centered curriculum is replaced by the National Curriculum (Báthory, 2000), which is characterized by the mutual cultural base and by the strengthening of the local planning (Szabó, L.T., 1991). We are convinced that the effects of the Romanian curricular reform on the teachers are straightaway and significant. The Hungarian teachers from Harghita County had a positive opinion on the *changes of the curriculum, on the separateness of the curriculum*, fact that assures them the possibility of optional subjects, flexible class frame, alternative coursebooks, and they accept the changes more readily than the Romanian teachers in general. (Școala la răscruce, 2001). All these lead us to the conclusion that Hungarian teachers from Harghita county do not retreat in front of the professional challenges in the development of the curriculum and of the extra activities. The steps made in the area of the curricular reform can be driven into a good direction by a proper educational policy and practical solutions. In the area of the curricular development we see the necessity of three tasks. These are the following: the assurance of the conditions for the teachers’ necessary curricular separateness, the extension of the proportion of the local planning, the elimination of the macro- and micro-level problems concerning the coursebooks and the auxiliary means.
5. On the basis of the structural analysis of the education and of the results of our research we can say that in spite of the priorities of the official educational policy between 2001-2004 (the improvement of the conditions of the teachers’ activity, the rising of the status of the profession), in the past one and a half decades the *Romanian teachers’ situation has not changed* in a significant way. Though the redundancy of the workers after the change of the political system did not affect this category of people, the teachers society has had to face two fundamental problems: the small wages and the great proportion of unskilled teachers. These two problems are not independent one from the other, since in spite of the great number of teachers’ training, the proportion of the unoccupied jobs in education has not diminished. Thus we have to face a *hidden lack of teachers* in the Romanian elementary education. Besides this, in the ranks of the youth the mobility inside the profession and towards other professions is very great. The results of our empirical research also underlined this tendency. The opinion of the

teachers from Harghita County concerning the leaving of this profession shows a significant relationship between the age and the professional experience. The older and the more has spent the teacher in this profession the less he thinks of leaving it, the younger he is the more he thinks of leaving this profession. In spite of all these the Hungarian teachers of this small region have a positive professional self-image: the majority of them love their profession (95.9%), most of them are satisfied with the activities of their profession (83.6%), and do not think too often to leave the profession (86.9). The inquired persons experienced indeed that the educational reform enlarged their scope of duties, and a great number of them feels that they suit the challenges of the reform. The teachers who took part in vocational course put their level of suitability higher than their colleagues.

6. The results of our research concerning the ***professional evaluation and the social appreciation of the profession*** can be interpreted only in relationship with the professional professionalism of the teachers to the Romanian possibilities. The Romanian teachers - similarly to the European practice - are employees. The progress in career is based on a seniority system, which is connected to the attended schools and to the time spent in the profession. Though we cannot deny the fact that there have been trials for the renewal of the vocational system, in the *Reform planning of 2001* the obsolete vocational system continued to appear in a centralized form. The results of our survey show that Hungarian teachers from the small region demand the real professional evaluation, and at the same time they are not satisfied with the operating methods. The teachers opinions depend on their age: the older generation accepts the system in effect, while the younger generation demands a more complex system, comprising more professional points of view (teaching, extra school activities, professional self-training). The inquired persons would accept the control of the users (parents, students) and of the colleagues, but they hardly accept the hierarchically built control (inspectors). In other researches from Romania (Școala la răscruce, 2001) and at other analysts (Iosifescu et al, 2001) appears the distancing from the authority, as a kind of mentality particularity of the Romanian teachers and school culture. This is caused by the long termed centralized bureaucracy.
7. The teachers from Harghita County are not satisfied with the ***social appreciation of their profession*** either., they consider that it is worse than of other intellectual categories. In general the teachers are not satisfied with the level of their social appreciation (Ferge et al, 1972; Háber, 1986; Szabó, 1998). Our results prove that the Hungarian teachers from the small region are not an exception. Further on, the inquired teachers are unsatisfied with the “official” appreciation of the profession, at the same time the appreciation of the different teachers’ profession is in relationship with the activities on the different levels of education. The Hungarian teachers from the small region see the rise of esteem of the profession in the solving of the problems of financing, of educational policy and of the teachers’ vocational courses.
8. Knowing the results of our empirical research on the Romanian educational system we are convinced that significant transformations in the ***situation of the teachers and of the social appreciation of the profession*** can be made only by the ***renewal of the teachers’ training*** and of the ***vocational courses***, as well as of the –seniority based – ***professional evaluation systems***. We cannot deny the steps made in this direction either (the bringing of the teachers’ training to the rank of a college, the theoretical development of the professional standards), but the positive effects of these are sensed only through a committed, consequent educational policy and

through the necessary practical steps. For example, it was assumed that the bringing of the teachers' training to the rank of a college would raise the prestige of the profession. But, the parallel functioning of the training in two types of institution (high school and college), and the inconsequent changes of the changing governments and ministries have not brought the significant results yet. The breaking of the traditional professional evaluation of the teachers and its revision according to the complex professional points of views (professional experience+activity during the class, extra activities related to the reform, development of curriculum, vocational courses, scientific activities and others) may improve more on the situation of the teachers.

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